NC eProcurement

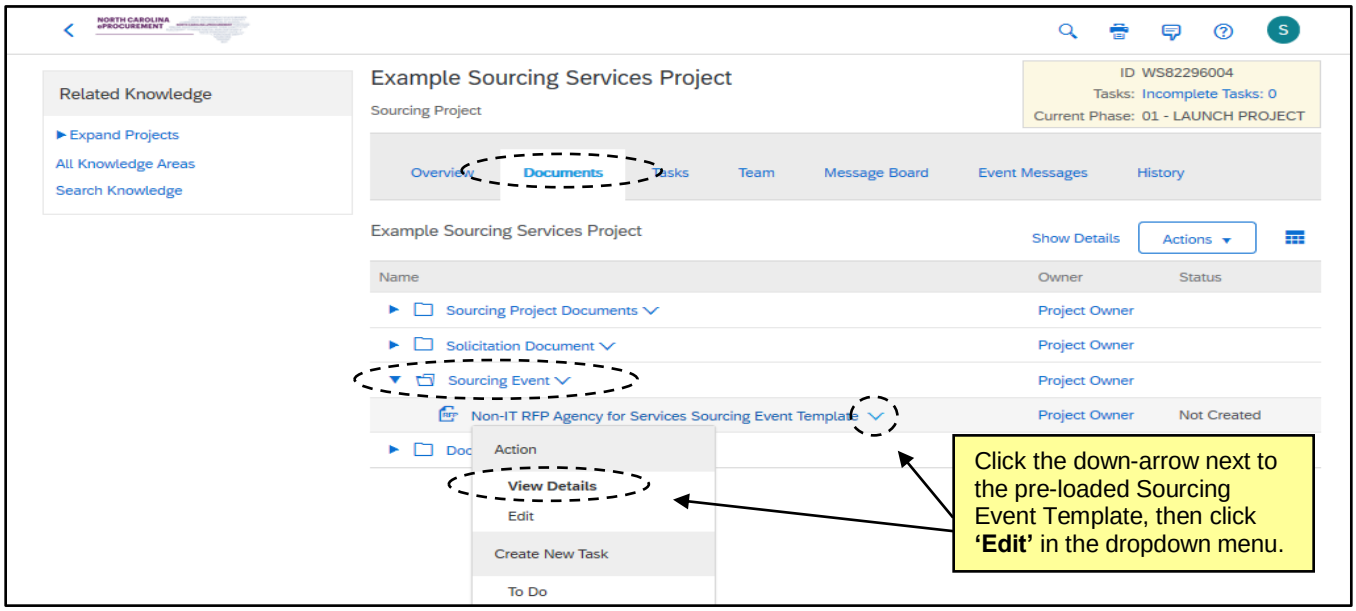
Managing a Sourcing Event

A Sourcing Event is the most important part of a Sourcing Project. It is where the buyer can establish the bidding dates and time, as well as compile all pertinent information to which the vendors will need to respond, as guided by a template established by the State. Notification of this Event can then be posted in IPS so that interested vendors can respond electronically in a consistent format and that questions and answers can be exchanged through the Sourcing Event if further clarification is needed by either side. Finally, responses can be reviewed, and a contract can be awarded.

I. Create a Sourcing Event

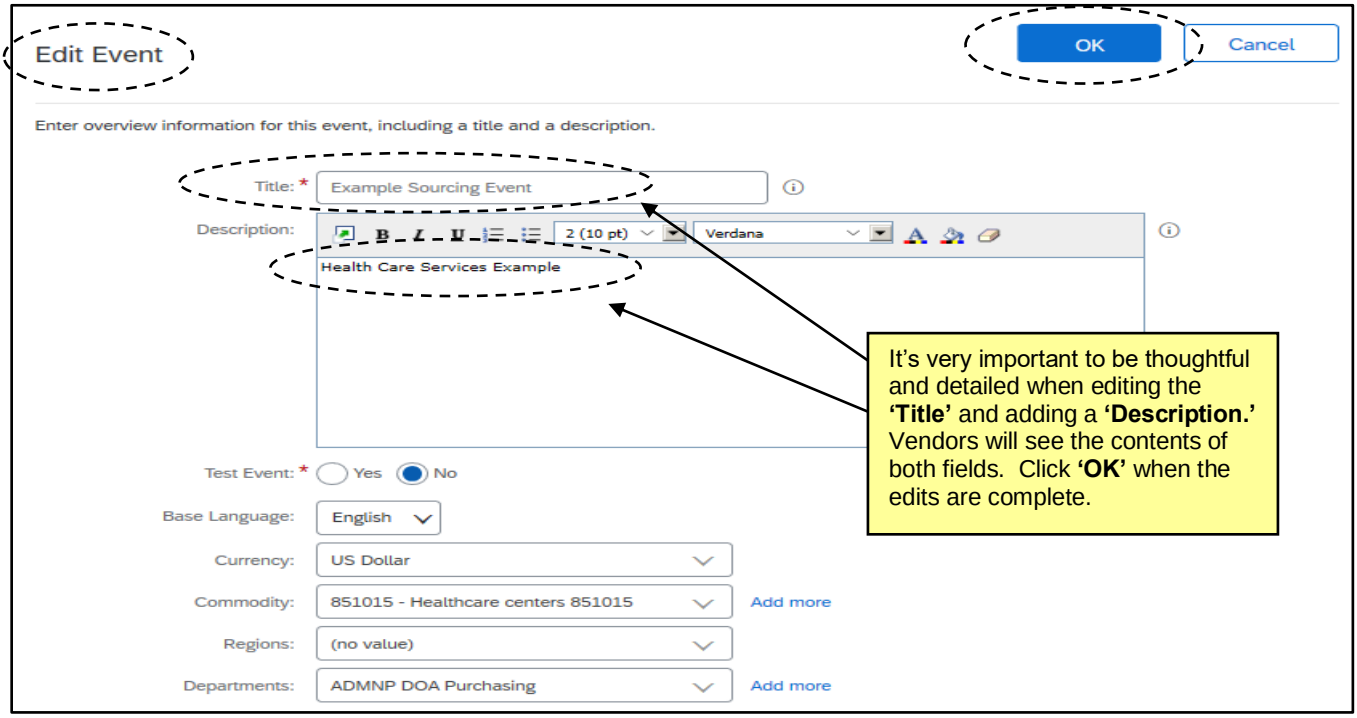
1. Navigate to the **'Documents'** tab of the Sourcing Project and click the down-arrow to the right of the document within the **'Sourcing Event'** folder and click **'Edit'** from the drop-down menu.

   Note: This document template will depend upon the selection made in the **'Solicitation Vehicle'** field when creating the Sourcing Project.



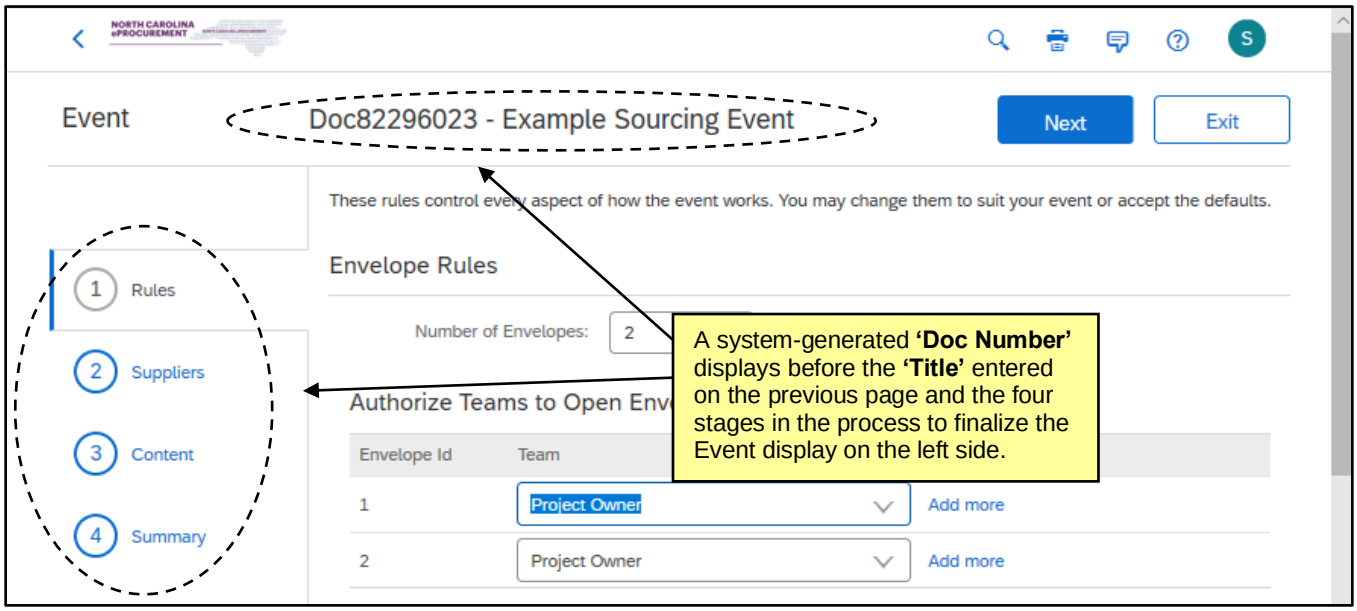
2. The **'Edit Event'** page will display. It is important to populate the **'Title'** and **'Description'** with pertinent information, keeping in mind that the **'Title'** will be visible to vendors who choose to respond within the tool, and the **'Description'** can be up to 120 characters and will be pasted in the IPS **'Summary'** field to provide the vendor community its first idea of what goods or services are needed.

   Select **'No'** for the **'Test Event'** field and leave the other fields as is**. 'Currency,' 'Commodity,'** and **'Departments'** will be pre-populated based on selections made when creating the Sourcing Project. Then click **'OK.'**



3. The **'Event'** page will display and will outline the four sections to be completed before publishing the Event: **'Rules,' 'Suppliers,' 'Content,'** and **'Summary.'**

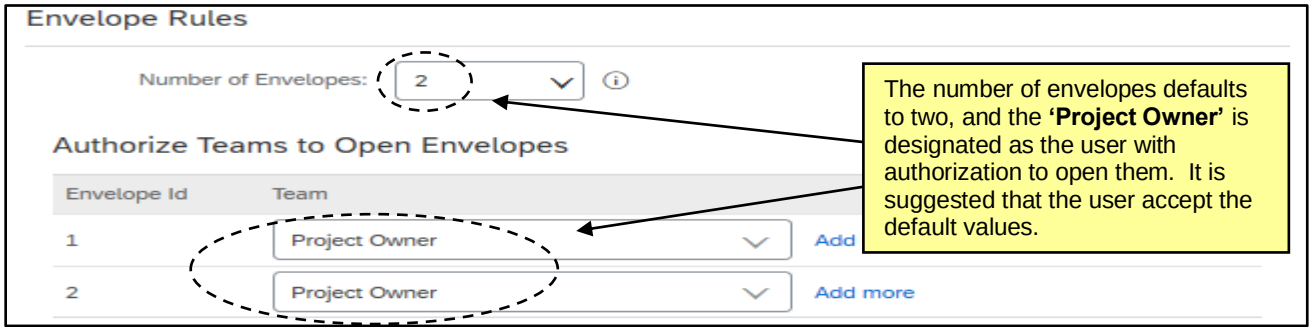
   Note: The Event will be assigned a **'Doc Number'** by the system immediately preceding the Event **'Title'** entered on the previous page. This **'Doc Number'** will be used as the IPS **'Solicitation Number'** following the user's entity-specific numerical prefix (i.e., 13-Doc82296023 for DOA).



II. Setting Event 'Rules'

The first of the four sections to edit and set are the Event **'Rules.'** Most importantly, the rules section allows the buyer to establish the **'Timing Rules'** outlining when the bidding starts and stops. Many of the fields within the six sub-sections on this page are pre-populated, and it is advised that users leave them as is.

1. **'Envelope Rules'** is the first subsection. The system will default the event to have two envelopes and lists the **'Project Owner'** group as the user group with the ability to open these envelopes. Envelopes will be discussed further in the **'Content'** section of the Event, but the first envelope contains information about the vendors who have responded, and the second envelope will contain the specific pricing details of each vendor's response. It is advised that the user leaves this section as is.



2. **'Timing Rules'** is the next and most important section. There are two required fields that set when vendors can begin to respond with bids and when their bids are last due.

    a. **'Response start date'** defaults to **'When I click the Publish button on the Summary page,'** meaning that vendors can begin responding immediately once the Event is finalized by clicking **'Publish.'** If the user would prefer to set a specific date in the future for when vendors can begin to respond, click **'Schedule For the Future'** and set a specific date and time from the pickers.

    b. **'Due date'** sets the time when the bidding period is closed. It defaults to **'Duration,'** where the user can select a time period in **'minutes,' 'hours,'** or **'days,'** or it can be switched to a **'Fixed time'** where the user can set a specific closing date and time from the pickers.

3. It is suggested that users leave all defaulted values as is for sections three through six. These four sections are **'Bidding Rules,' 'Project Owner Actions,' 'Market Feedback,'** and **'Message Board.'** When all Event **'Rules'** have been set, click **'Next.'**

III. Handling Participants in the 'Suppliers' Section

At the time of publication, the process for handling Event participants has not been finalized. Please check back later for more details.

IV. Updating the Sourcing Event Content

The **'Content'** section of the Event is where the user can share all information about the products or services they wish to receive bids on, as well as provide a framework of questions for vendors to answer to help the buyer choose the most-deserving bidder to award the contract to. The State has created an extensive template in this section, and it is advised that users follow the suggested outline.

1. The **'Content'** stage is divided into seven numerical sections, some of which have subsections:

    1) **Welcome to the State of North Carolina's Sourcing Tool:** A brief welcome message for vendors.

    2) **Instructions and How to Use the Sourcing Tool:** Instructions and tips for vendors on how to provide a response within the tool.

    3) **Solicitation Document and Details:** Users will upload their completed **'Solicitation Document'** in section **3.1**. Vendors will find a pre-loaded template for submitting questions in section **3.2**. If the user needs to respond with an **'Addendum,'** they will post it here and it will become section **3.3**.

    4) **Vendor Information:** This section requires vendors provide their **'Customer Number'** from their NC eVP account, and the answers will be provided in **'Envelope 1.'**

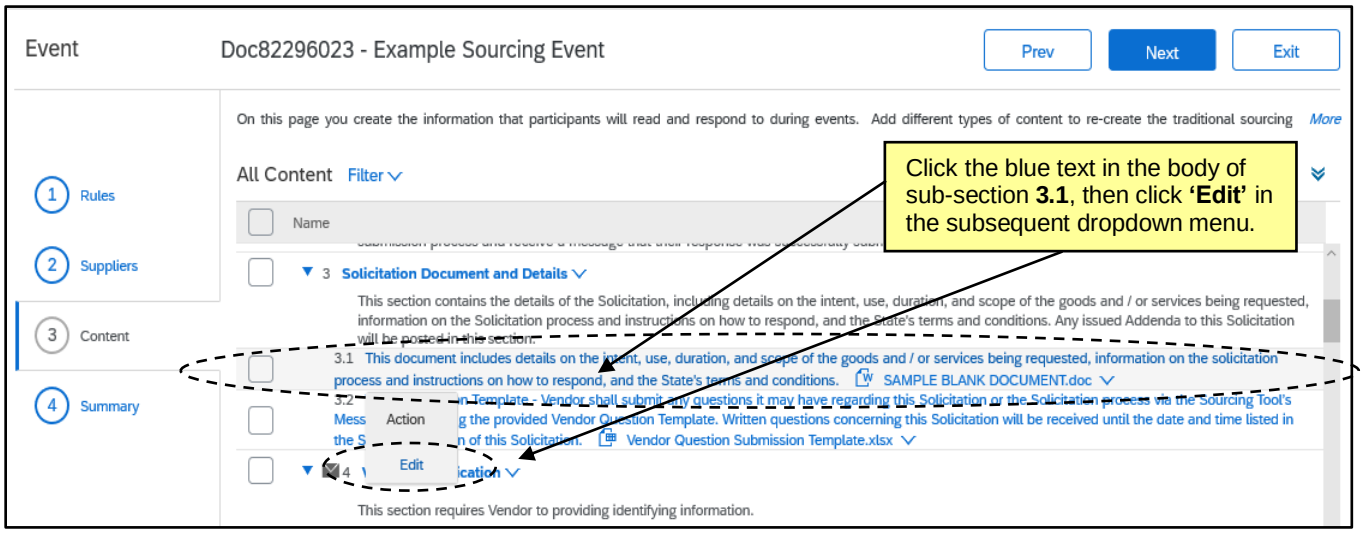
    5) **Pricing Submittal:** The user will upload a customized pricing response template that vendors will download, complete with the prices they are bidding on the requested products or services, and re-upload to the Event as an attachment. This information will be available to view by the user in **'Envelope 2.'**

    6) **Vendor Responses:** This section has 27 default sub-sections consisting of general questions and information requested from the vendors by the State to accompany their pricing submittal. Some questions can be answered with free-text, while other fields provide the vendors with a drop-down menu or the ability to add an attachment. All questions are required to be answered by default. These answers will be visible in **'Envelope 1.'**

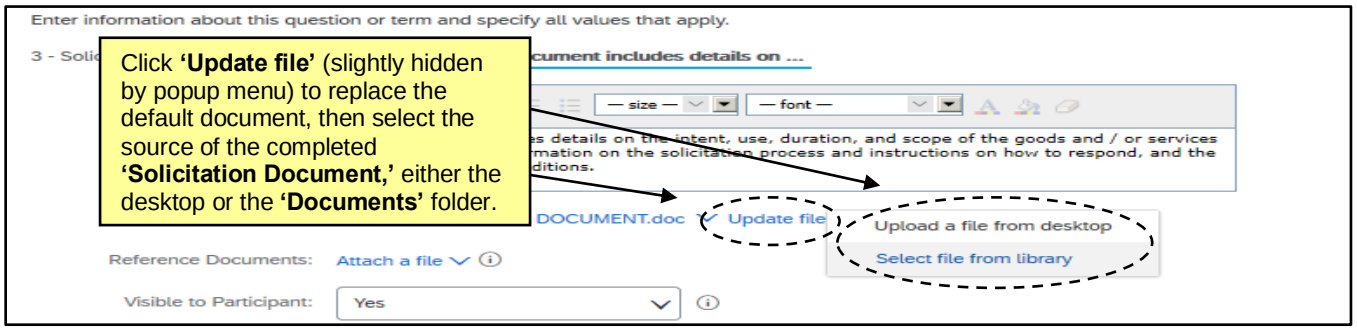
    7) **Additional Questions to Vendor:** Vendors can provide additional information such as a further description of their qualifications or up to three references. These answers will also be visible in **'Envelope 1.'**

    Note: Section 7 will only not display for **'Goods'** Solicitations.

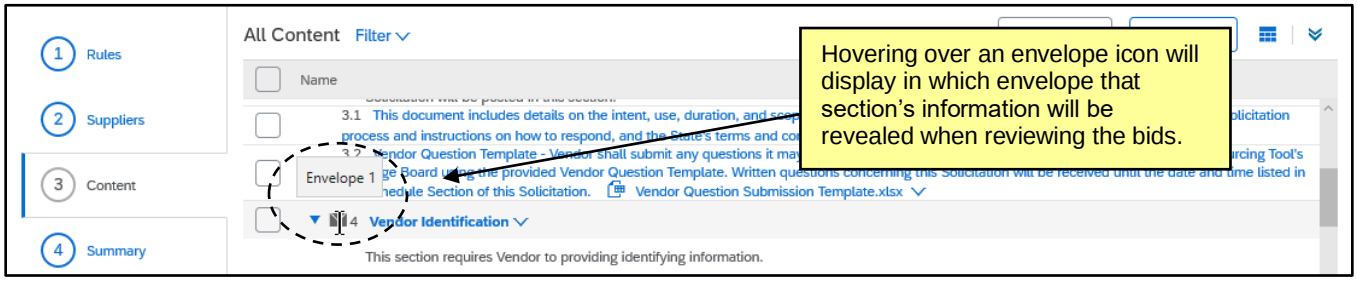
2. Section 3, **'Solicitation Document and Details,'** is the first section a user needs to update. A **'SAMPLE BLANK DOCUMENT.doc'** is attached to **3.1** by default. The user can click on this document and download it, but that is not necessary, as it is simply a blank placeholder. Instead, click on the blue text in the body of **3.1** and select **'Edit'** from the subsequent dropdown menu.



3. The **'Edit Attachment'** page displays. Click **'Update file'** next to **the 'SAMPLE BLANK DOCUMENT.doc'** file, then attach the finalized Solicitation Document by selecting either **'Upload a file from desktop'** if it's most easily accessed there, or **'Select file from library'** to pull it from the **'Documents'** tab of the overall **'Sourcing Project.'** When the actual document is attached, click **'Done.'**

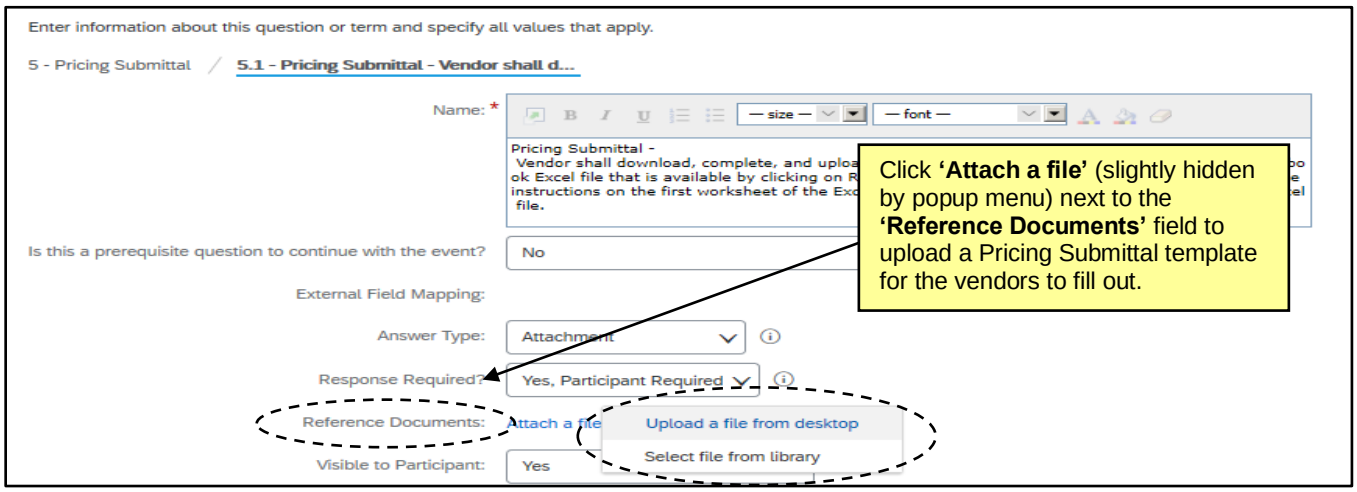


4. There is no necessary action in Section 4. Note the envelope icon next to the number and hover the cursor over it to display in which envelope that section's answers will be revealed.



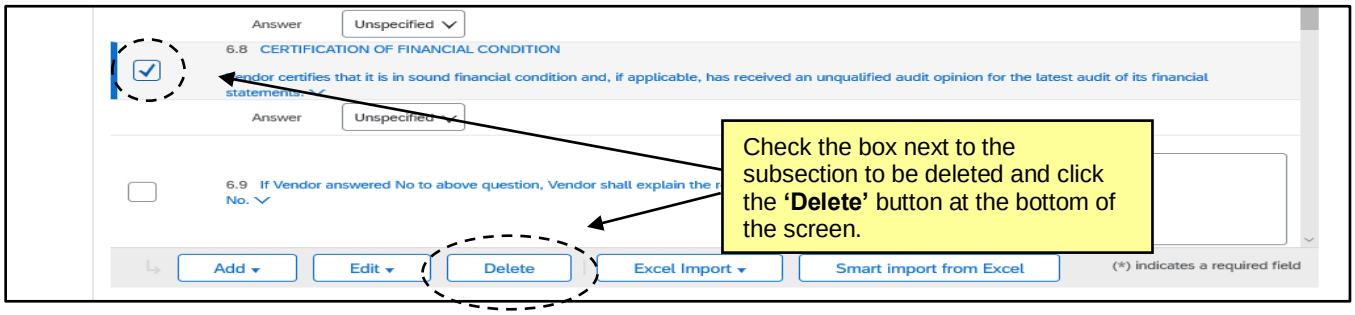
5. In Section 5, Vendors will attach their pricing responses to the products or services being bid upon. The user must provide a template for vendors to populate. In **5.1**, duplicate the steps performed in **3.1** by clicking on the blue text in the body and selecting **'Edit'** from the dropdown menu.

6. Navigate to the **'Reference Documents'** field and click the **'Attach a file'** link. Add the Pricing Submittal template the vendor needs to fill out, either from the desktop or the **'Documents'** tab if it has been saved there, and click '**Done.'** Vendors are instructed to download this template to fill out with their pricing and re-upload it for the user to review in **'Envelope 2.'**



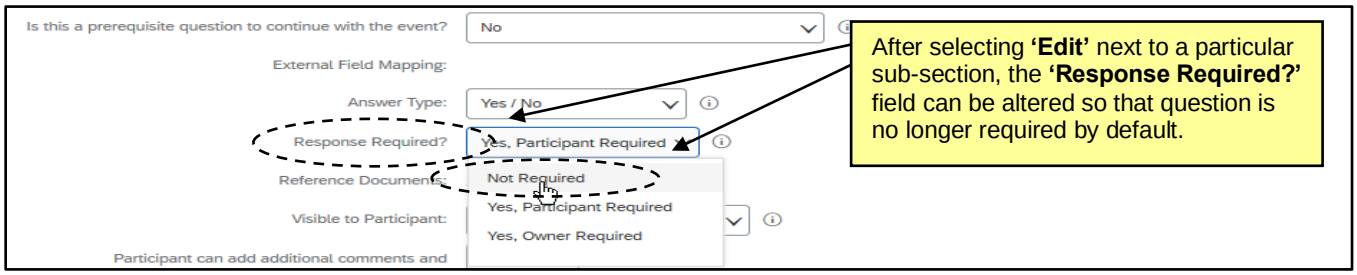
7. Section 6 contains numerous questions for vendors to answer accompanying their pricing submittal. By default they are all required, however, if necessary, they can be edited or deleted, although this is not advised.

8. To delete a question, check the box to the left of that question and click the **'Delete'** button at the bottom of the **'Content'** section. The question will be removed (it cannot be undeleted), and the subsection numbering below it will automatically adjust.

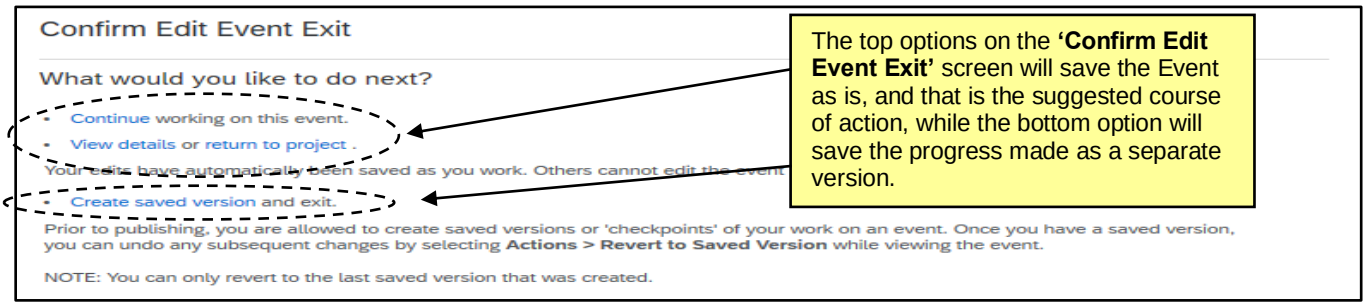


9. To edit a question, check the box to the left of that question and click the **'Edit'** button at the bottom of the **'Content'** section. From the subsequent dropdown menu, click **'Content.'**

10. The **'Edit Question'** page will display. It is highly advised that no edits be made to these questions. One potential field to change is the **'Response Required?'** field. This field defaults to **'Yes, Participant Required,'** but if the user would like to keep the question but not make it a mandatory one for the vendor, they can select **'Not Required'** from the dropdown menu and click **'Done.'**



11. If the user cannot complete all four sections of the Event in one sitting, they can click the **'Exit'** button at the top or bottom of the screen and will be presented with a few options. The top options will save the progress made, and the user will be able to revisit and complete the Event before eventually publishing it. The top option is the suggested action. The bottom option to **'Create saved version'** will save the progress made as a separate version, and the screen will include instructions on how to undo any subsequent changes. The bottom option works if desired but is generally unnecessary.



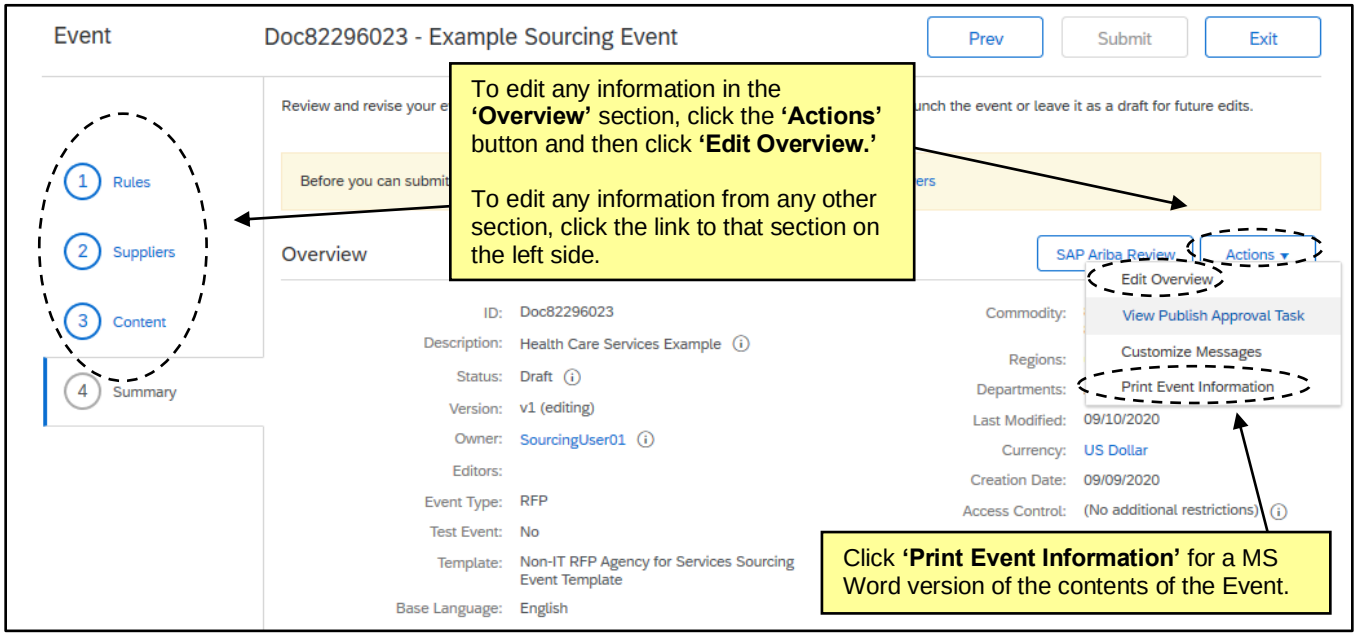
V. Summary Section and Publishing the Event

The fourth and final section in the Event is the **'Summary.'** This contains the summary of the first three sections and allows the user to review and edit before adding a mandatory approver and clicking **'Submit'** to Publish the Event.

1. The **'Overview'** information is at the top of the page, above the **'Rules,' 'Suppliers,'** and **'Content'** information in descending order. To edit any of the **'Overview,'** click the **'Actions'** button and select **'Edit Overview'** from the dropdown menu. If any other sections need to be edited, click on that section on the left side of the screen.

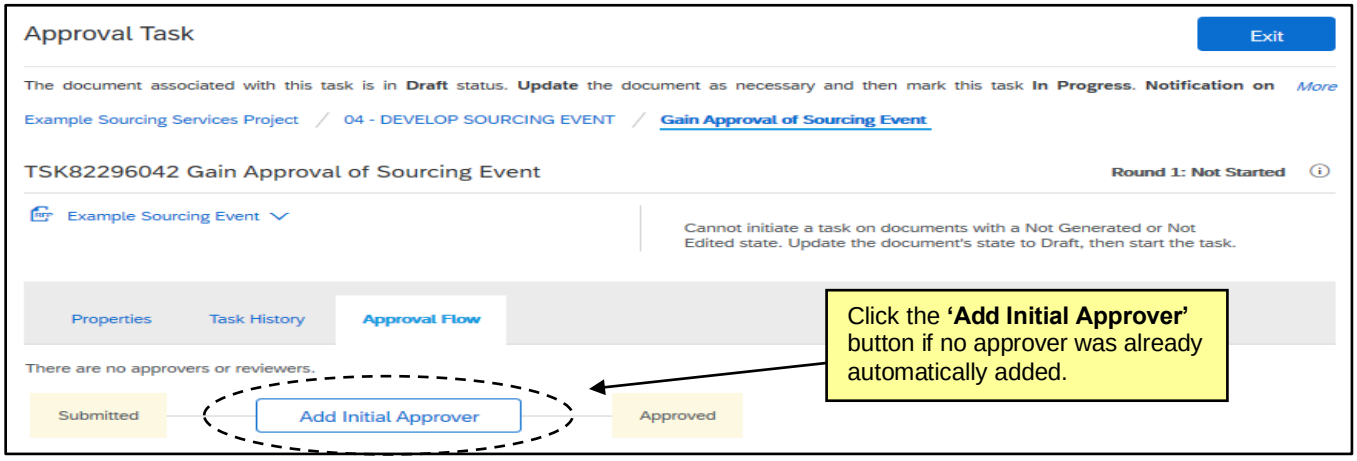
2. For a summary of the entire contents of the Event in the form of a MS Word document (which may be helpful to refer to when posting Event information to IPS), click the **'Actions'** button and select **'Print Event Information,'** and the system will generate an up-to-date, time-stamped document.

   Note: Avoid clicking the **'SAP Ariba Review'** button.

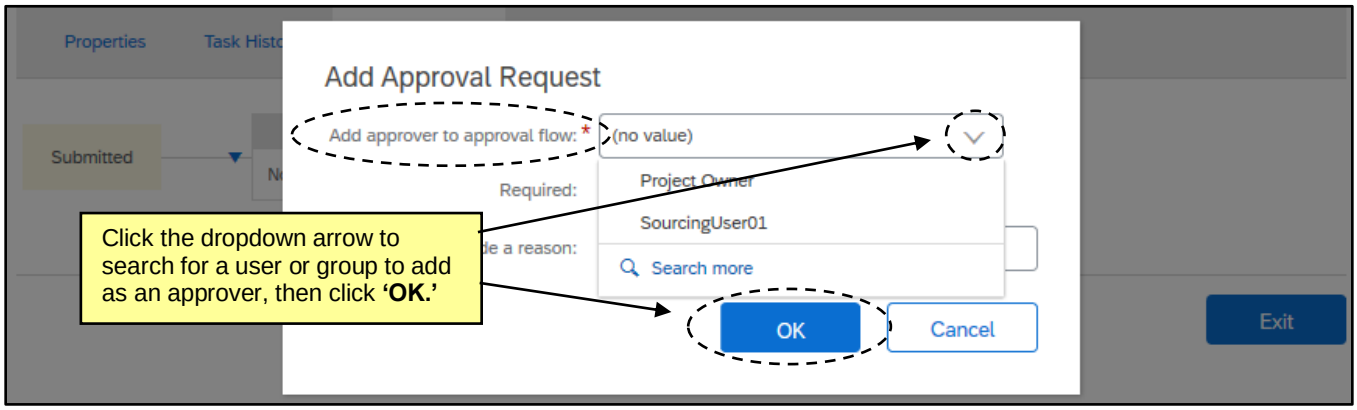


3. The **'Submit'** button will be greyed-out and inactive until an approver is added to the Event if one wasn't already added by default (when the amount entered in the Sourcing Project Attributes **'Estimated Annual Contract Value'** field is $1,000,000 or more, P&C is automatically added as an approver). To do so, click the **'View Approvers'** link above the **'Overview'** section.

4. The **'Approval Task'** page will display. Click the **'Add Initial Approver'** button.

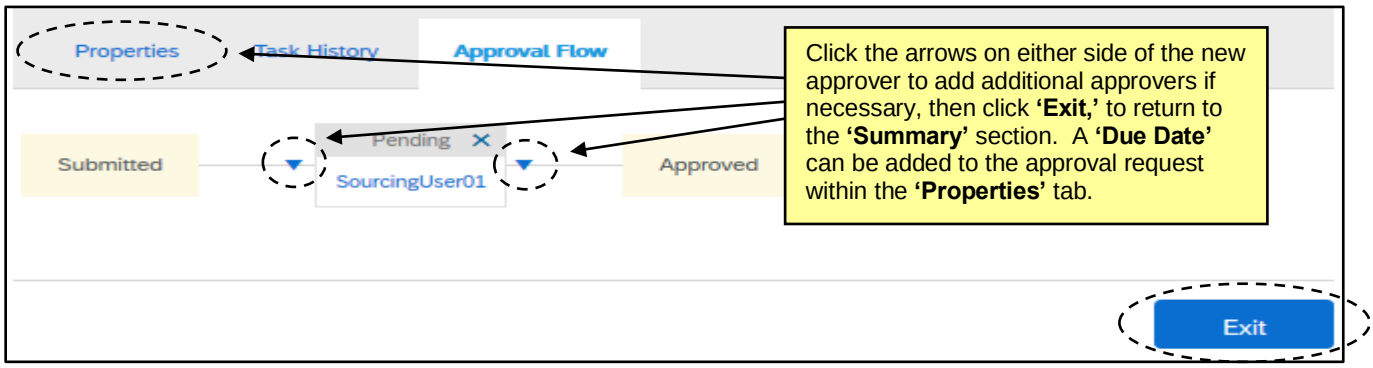


5. Click the arrow to the right of the **'Add approver to approval flow'** field and select the appropriate user or group needing to approve the Event from the dropdown menu. When selected, click **'OK.'**

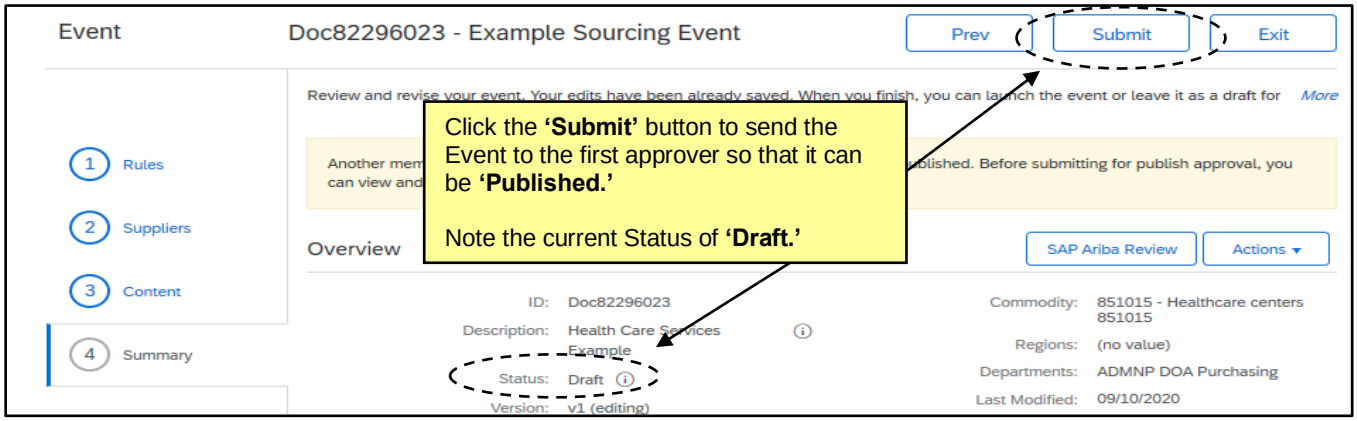


6. The new approval flow will display, and additional approvers can be added in sequence by clicking the blue arrows before or after the **'Pending'** approver. Click **'Exit'** to return to the **'Summary'** section.

   Note: Clicking on the **'Properties'** tab and adding a **'Due Date'** for the approval will send the approval request to the approver's '**Notifications'** portlet as well as sending the standard email.

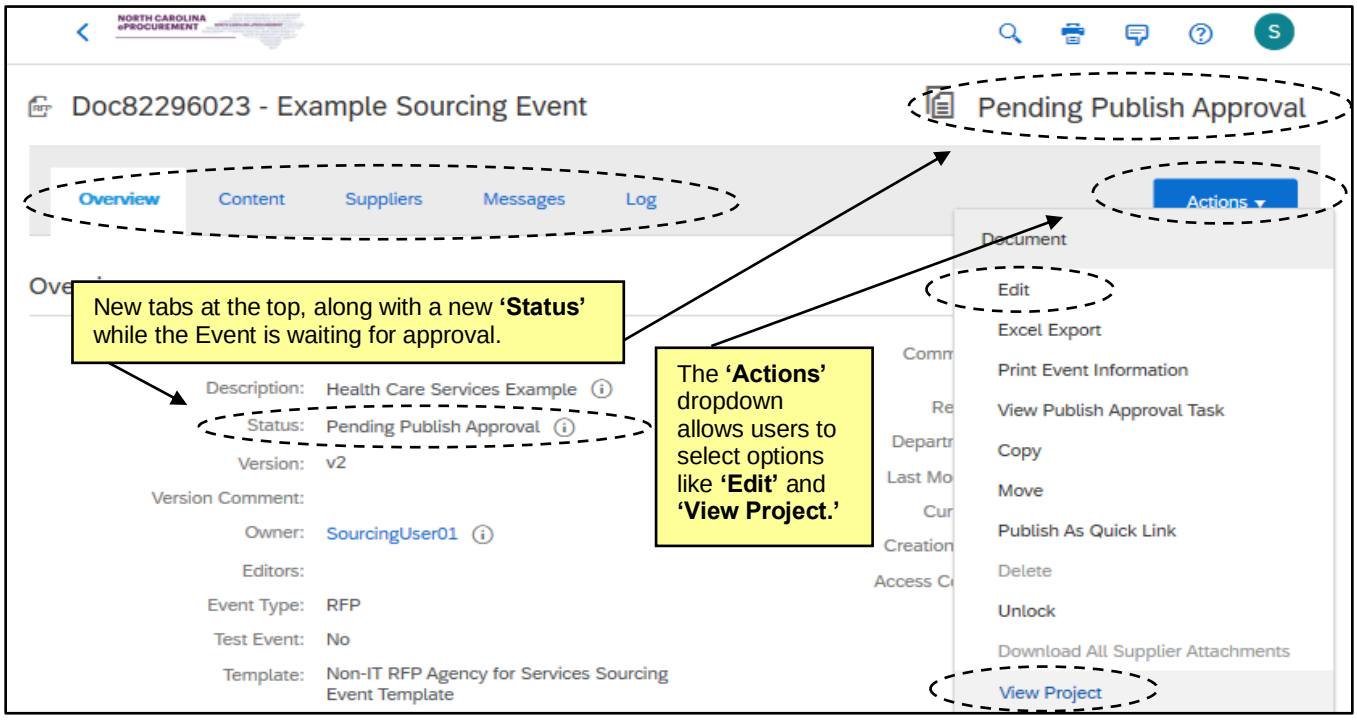


7. The **'Submit'** button is now active and can be clicked to **'Publish'** (pending approvals) the Event. Until that time, the Event will remain in **'Draft'** status.

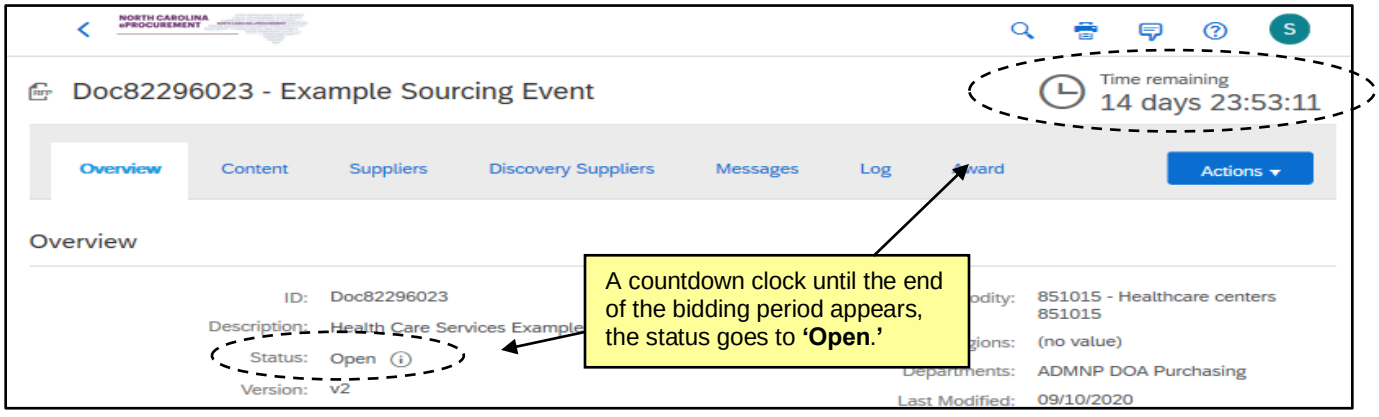


8. The **'Event Submitted for Approval'** page displays, and the user will have the option to return to the Event or go back to the overall Project. Upon returning to the Event, the user will find five tabs at the top of the screen**. 'Overview'** is the default tab, and that is where the **'Rules'** are summarized along with a **'Version History'** section towards the bottom and any **'Tasks'** associated with this Event, including the recent **'Approval'** request will be displayed at the very bottom.

9. Other tabs include **'Content,' 'Suppliers,' 'Messages,'** and **'Log.'** Until the Event has been fully approved, the Status will be listed as **'Pending Publish Approval.'** Clicking the **'Actions'** button will display several options including **'Edit'** to make any necessary changes and **'View Project'** to navigate directly to the Sourcing Project within which this Event exists.



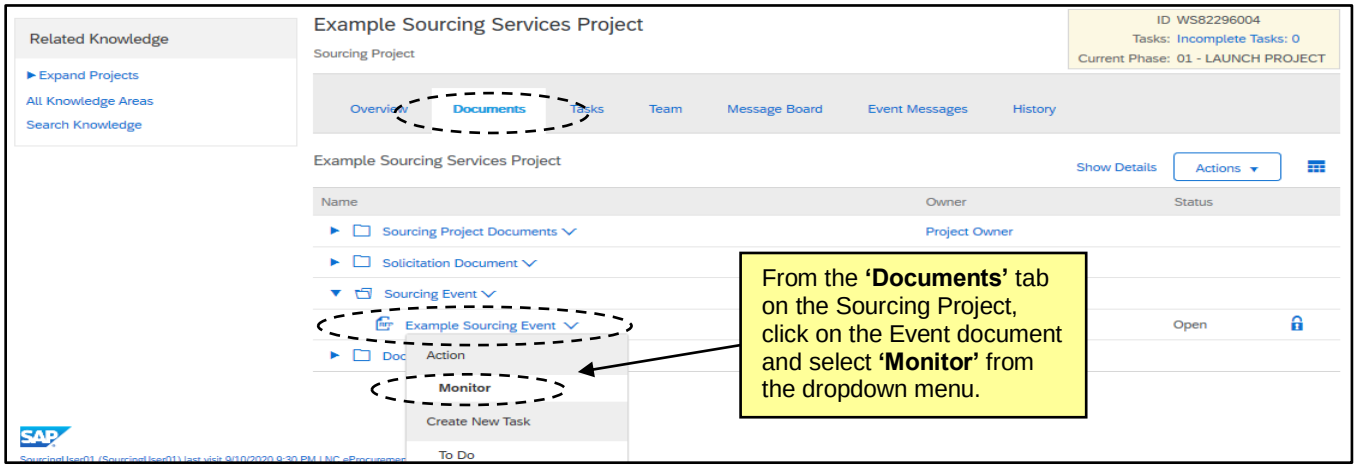
10. Once the Event has been approved, it becomes **'Published,'** and based on the timing rules established, it may immediately be **'Open'** to receive bids, as is the case below. A clock will appear in the upper right counting down how much time is left until the bidding period is closed. Two new tabs will also appear: **'Discovery Suppliers,'** and **'Award,'** although both of these tabs can be ignored.



VI. Managing a Published Event and Responding to Vendor Questions

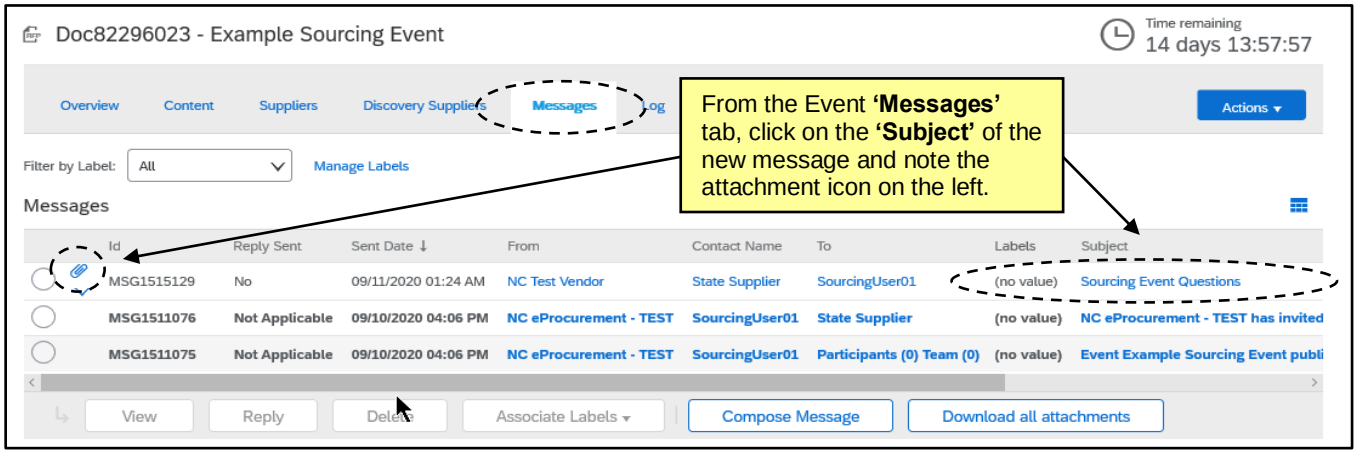
Once the Event has been approved, **Phase 4** of the Sourcing Project will automatically be recorded as complete as noted by a checkmark. The first task in **Phase 5** is to **'Post Sourcing Event Summary and Link to Sourcing Event on IPS.'** Posting the link within IPS will give vendors interested in responding the ability to access the Event via their Ariba Network accounts and a path to an electronic response. During the Event, if responders have any questions, they will submit them via the Event message board, and if necessary, the user can address those questions by posting an **'Addendum'** in the Event before responders submit their final bids.

1. From the **'Documents'** tab on the Sourcing Project, click on the Event document and select **'Monitor'** from the dropdown menu.

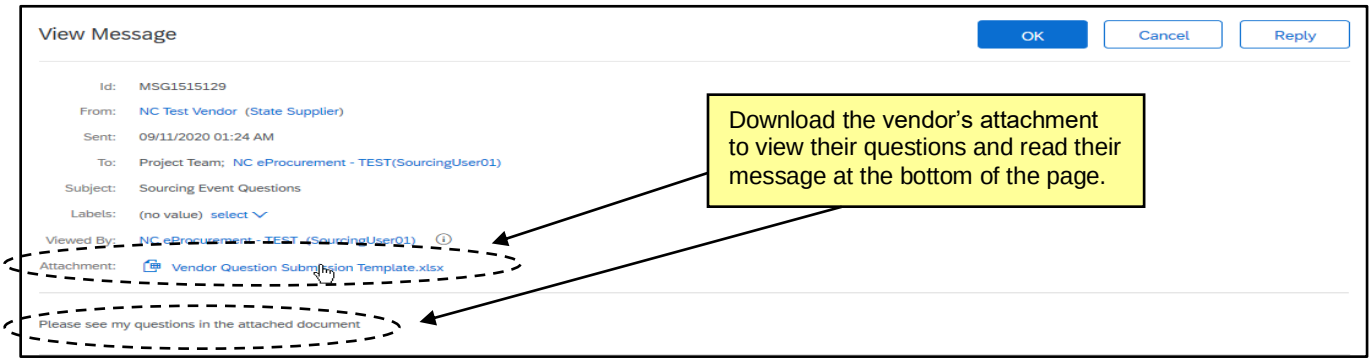


2. Go to IPS and populate the Solicitation Posting as instructed by P&C. Remember that the **'Solicitation Number'** field will be the user's numerical Entity number followed by the system-generated **'Doc Number'** given in the Sourcing Event and that the **'Summary'** field accepts up to 120 characters of the Event **'Description.'**

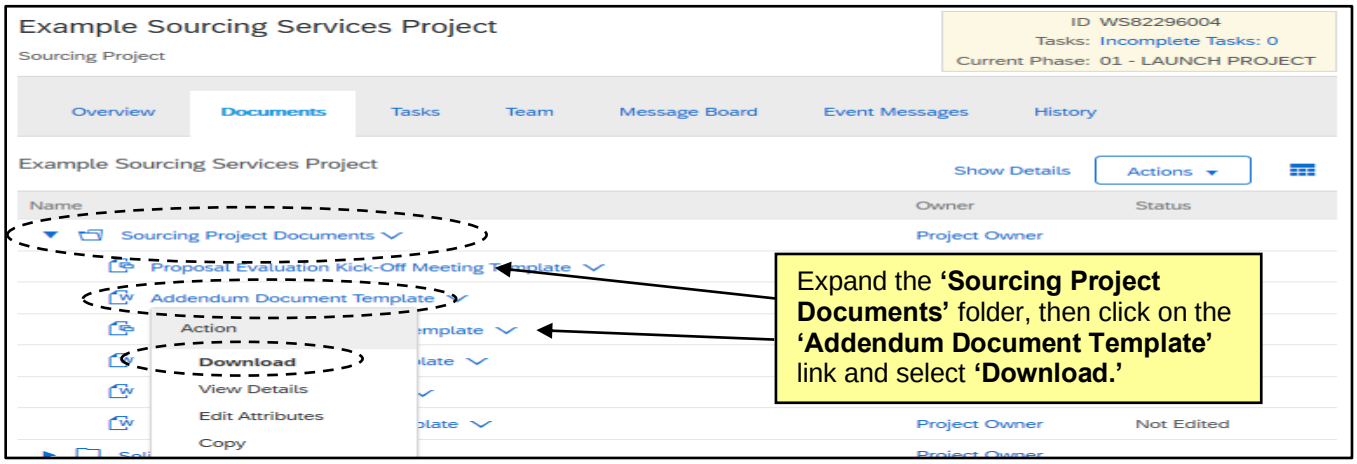
3. If a vendor has any questions during the Q&A period, the vendor is instructed to submit them on a template provided in the **'Contents'** and notify the user via the Event message board. A notification will appear on the home page when a message is received, or check the **'Messages'** tab on the Event at any time. Click on the **'Subject'** of the new message to read the message and note the attachment icon on the left side.



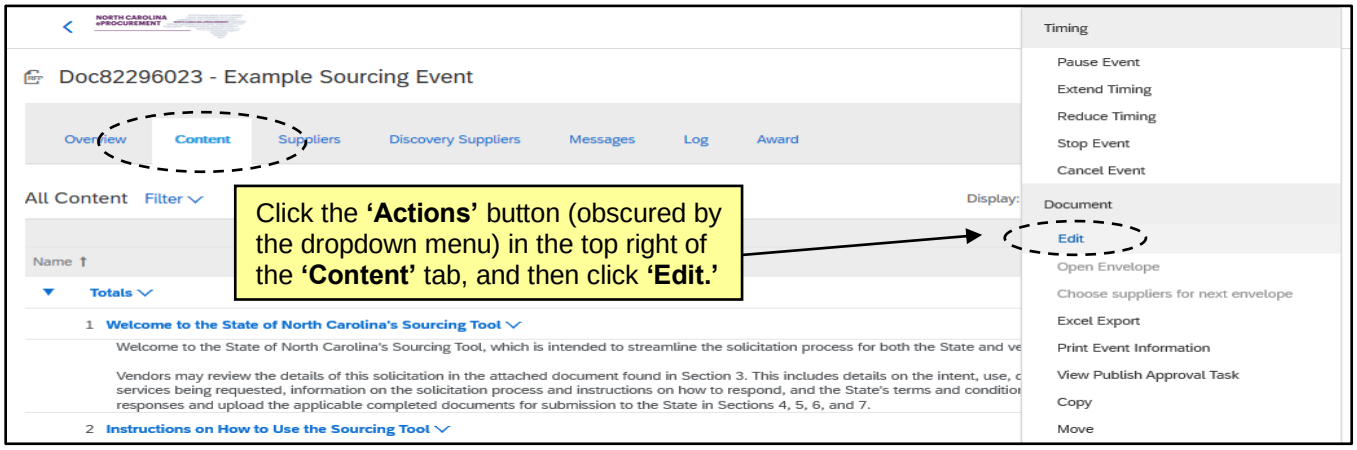
4. The **'View Message'** page will display, and the user can download the vendor's question attachment document and read their message at the bottom of the page.



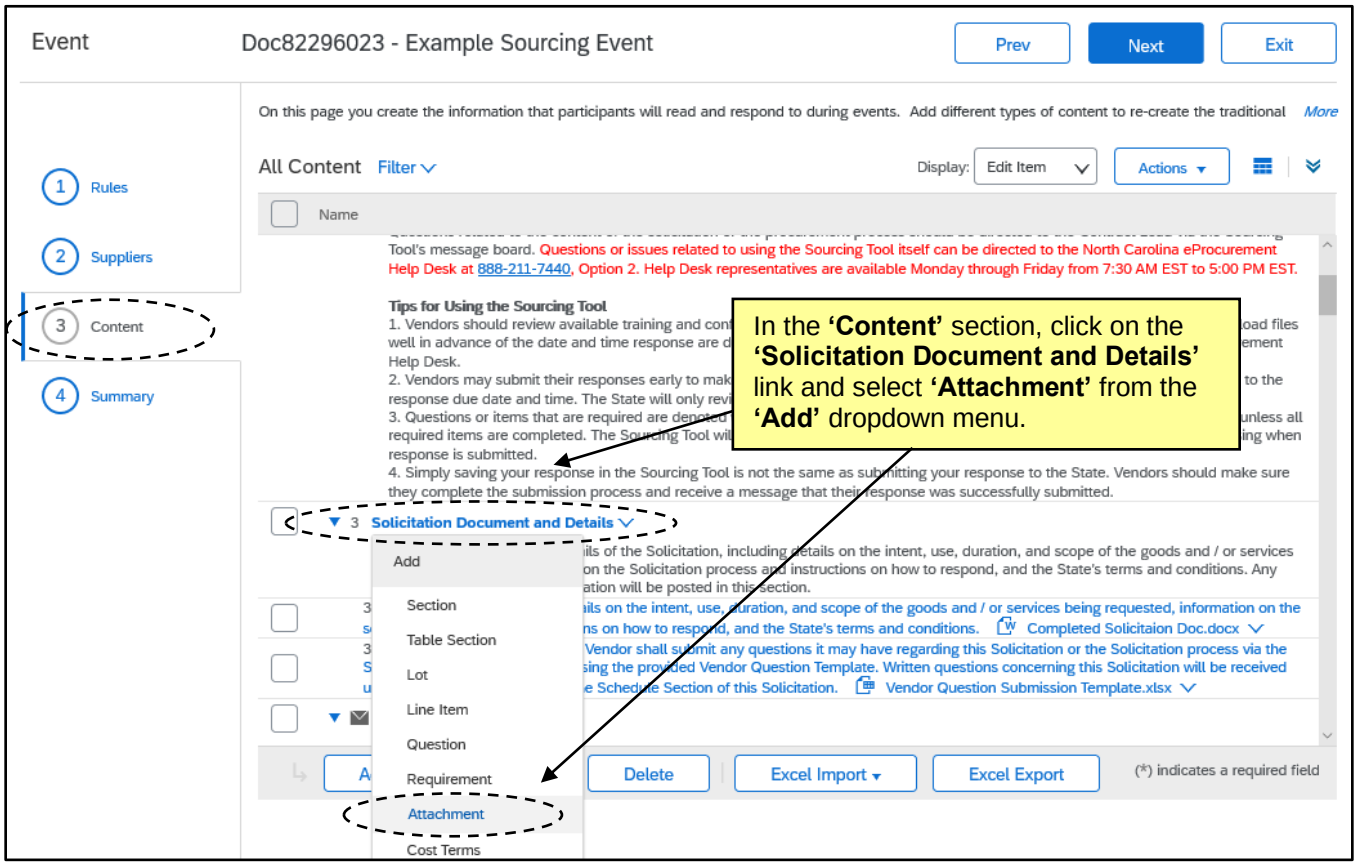
5. When the Q&A period is over and all vendor questions have been reviewed, the user may need to create an **'Addendum'** to address the questions. From the **'Documents'** tab on the Project, expand the **'Sourcing Project Documents'** folder, then click on the **'Addendum Document Template'** link and select **'Download.'** Fill the document out, rename it, and save it back into the Project.



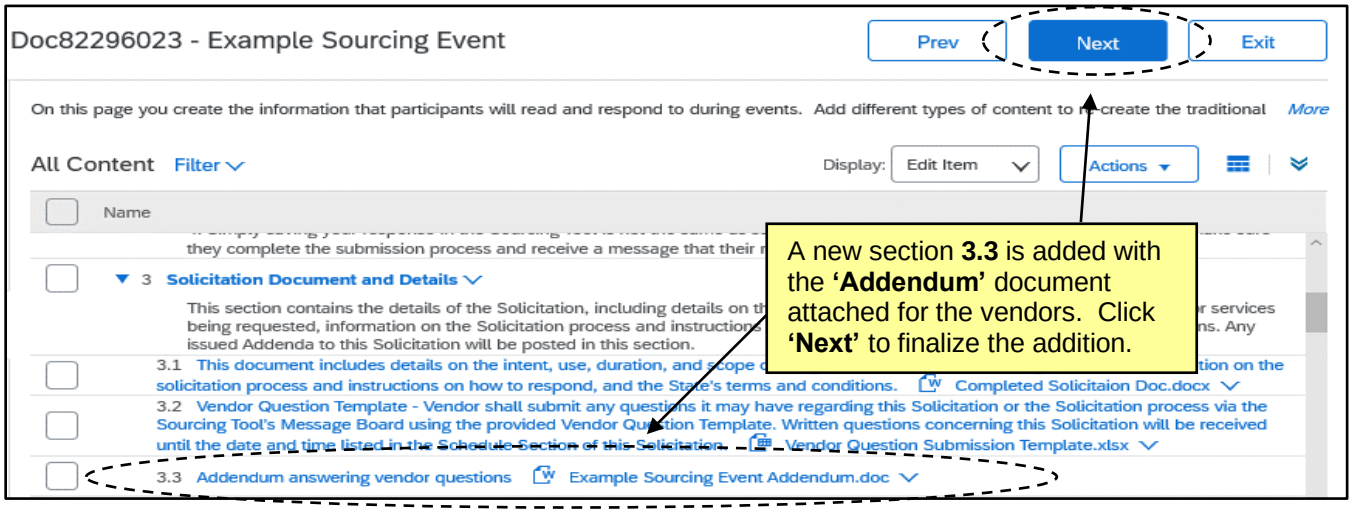
6. **'Monitor'** the Event again from the Project's **'Documents'** tab, and then navigate to the Event **'Content'** tab. Click the **'Actions'** button in the top right and select **'Edit'** from the dropdown menu.



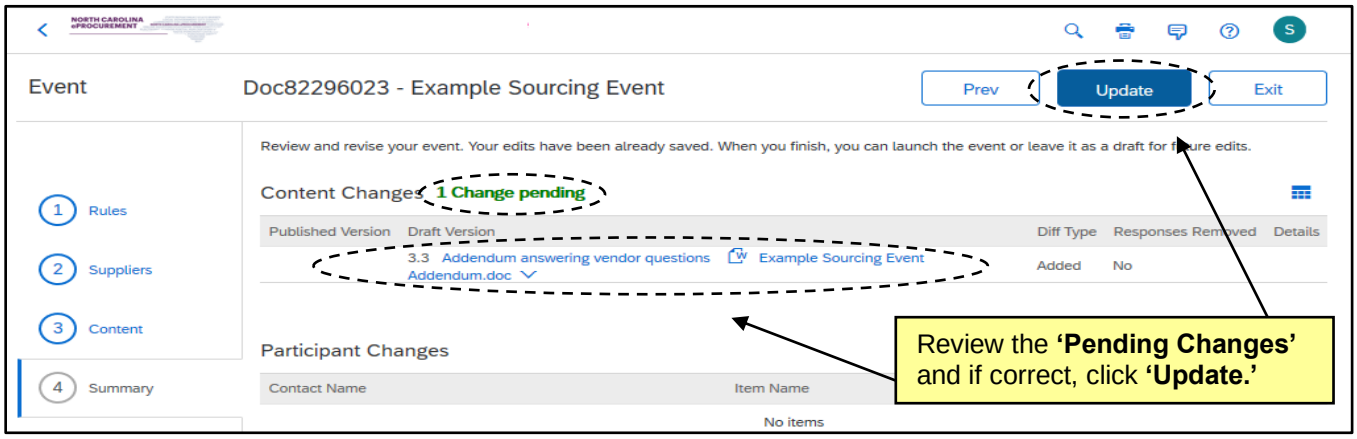
7. Click the **'Content'** link on the left side of the screen, click on the **'Solicitation Document and Details'** link next to **3,** and select **'Attachment'** from the **'Add'** dropdown menu.



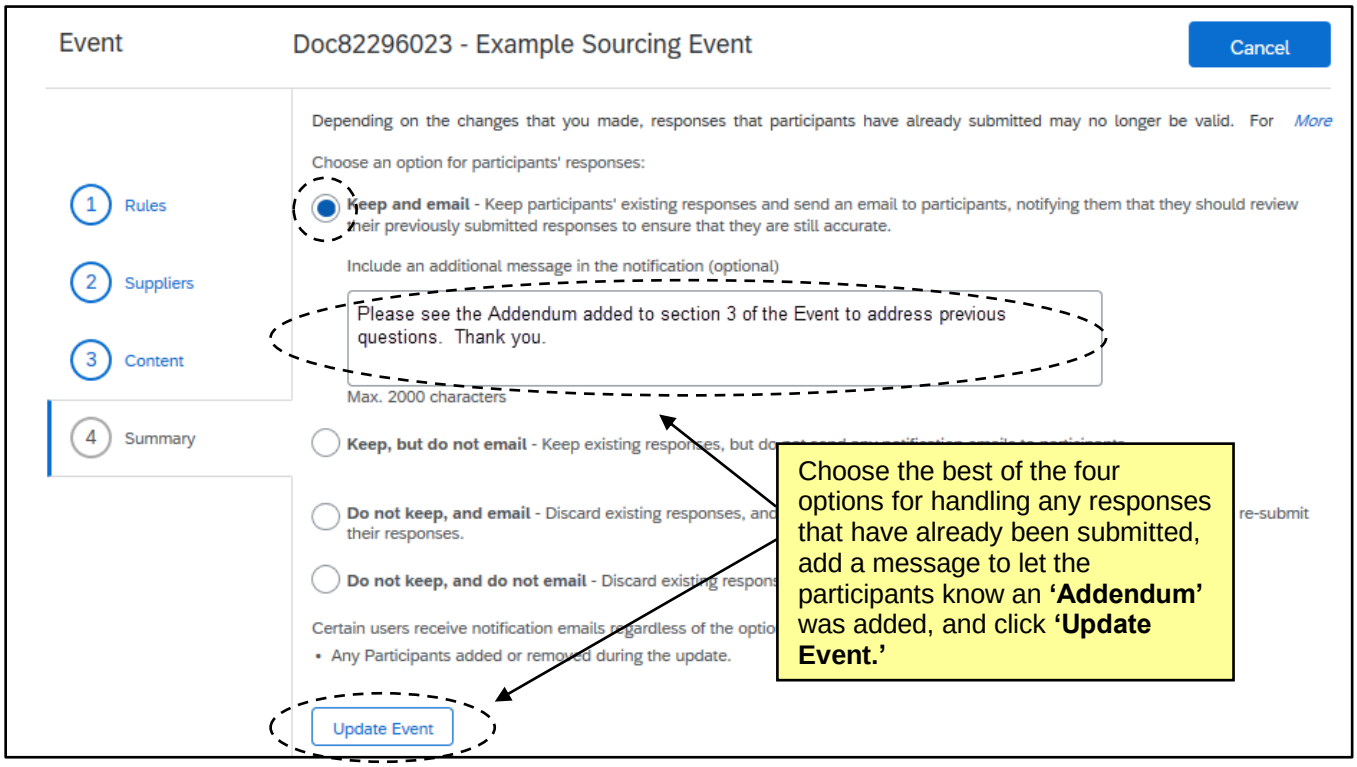
8. The **'Add Attachment'** page will display, and the attachment will automatically be assigned **3.3.** Attach the completed **'Addendum'** document in the **'Attachment'** field. The name of the document will auto-populate the name of the new section. Add a **'Description'** to let the vendors know this is where they can find the answers to their questions and click **'Done.'** The newly added section **3.3** will now display with the **'Addendum'** document attached for the vendors to review. Click **'Next.'**



9. The **'Pending Changes'** will display in the **'Summary'** section where the user can review the change before finalizing it by clicking **'Update'** in the top right.



10. A final review page will display giving the user four options for handling any responses that may have already been submitted by vendors**. 'Keep and email,' 'Keep, but do not email,' 'Do not keep, and email,'** and **'Do not keep, and do not email.'** Select the option that makes the most sense given the situation per guidance from P&C and add a brief message in the box to let the vendors know that an **'Addendum'** has been added. Click **'Update Event'** to officially attach the **'Addendum,'** and the user will be given the option to return to the Event or go the Project.

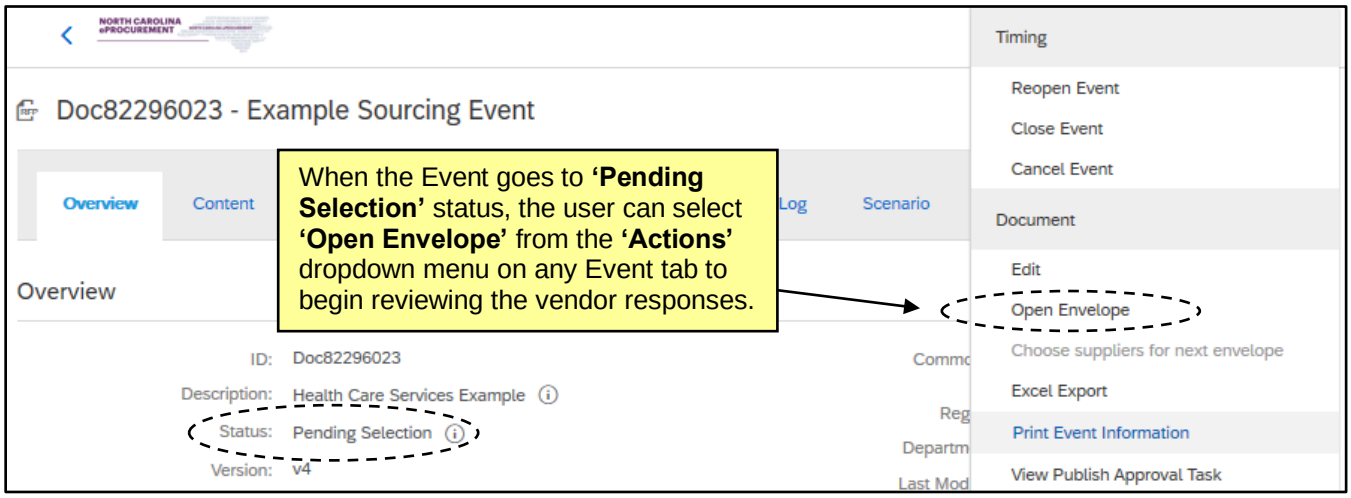


11. A new message will automatically post to the Event message board to notify internal responders of the **'Addendum,'** but the user should also go back to IPS at this time and post an **'Addendum Notification'** for the public to see.

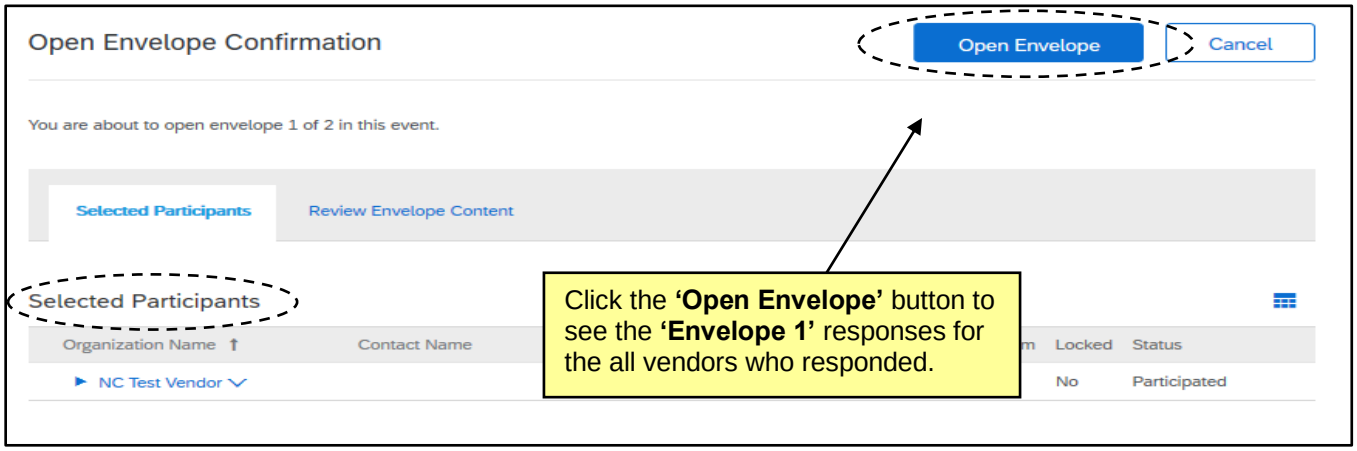
VII. Reviewing Responses and Requesting Clarification or a BAFO

When the Event reaches the response due date, the event status becomes **'Pending Selection.'** At this point the user can begin to open the **'Envelopes'** to review the responses.

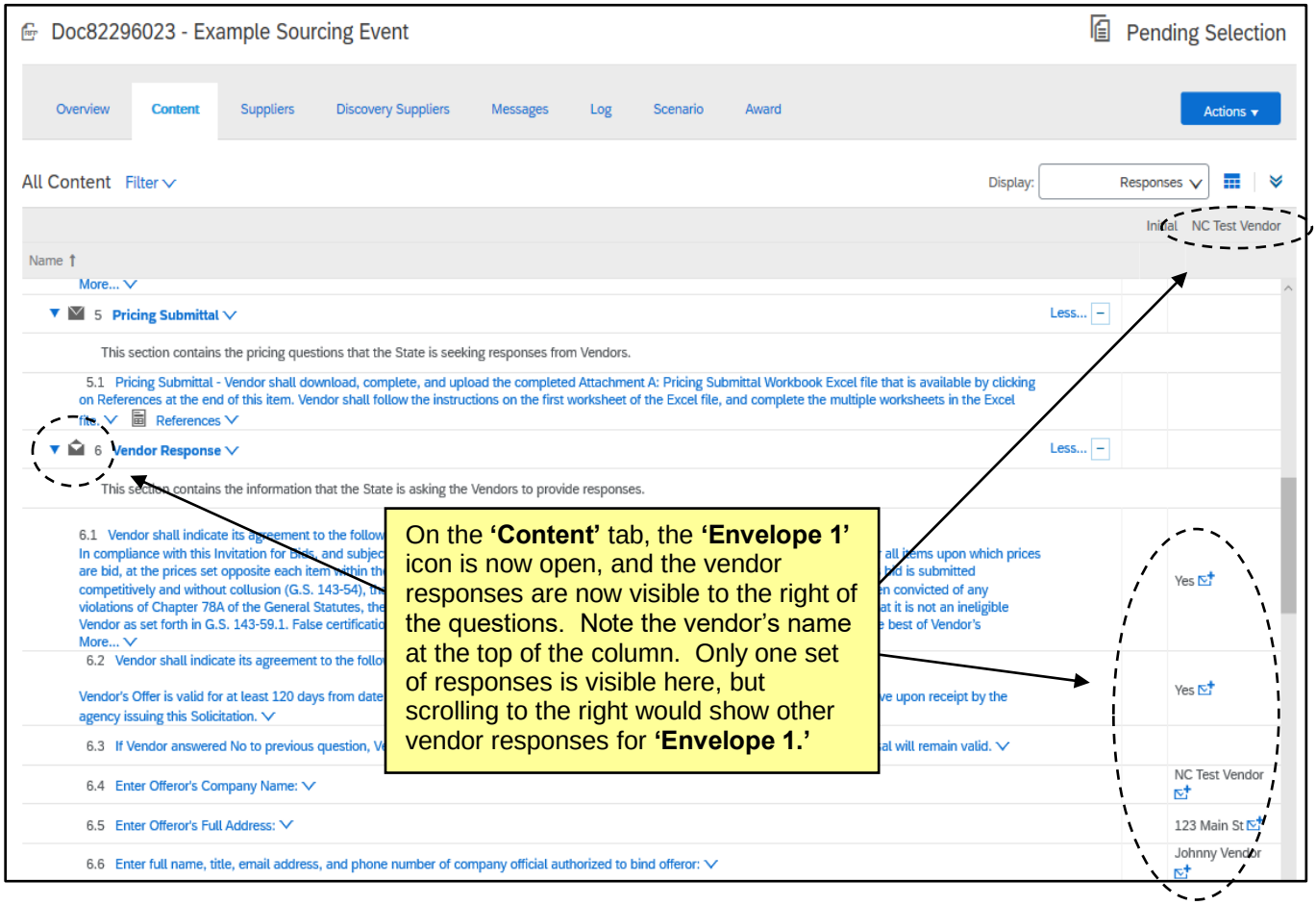
1. When the bidding is closed, the Event will go to a **'Pending Selection'** status. At that time, the user can click the **'Actions'** button in the top right (obscured by the popup menu in the image below) and select **'Open Envelopes'** to begin to review the bids.



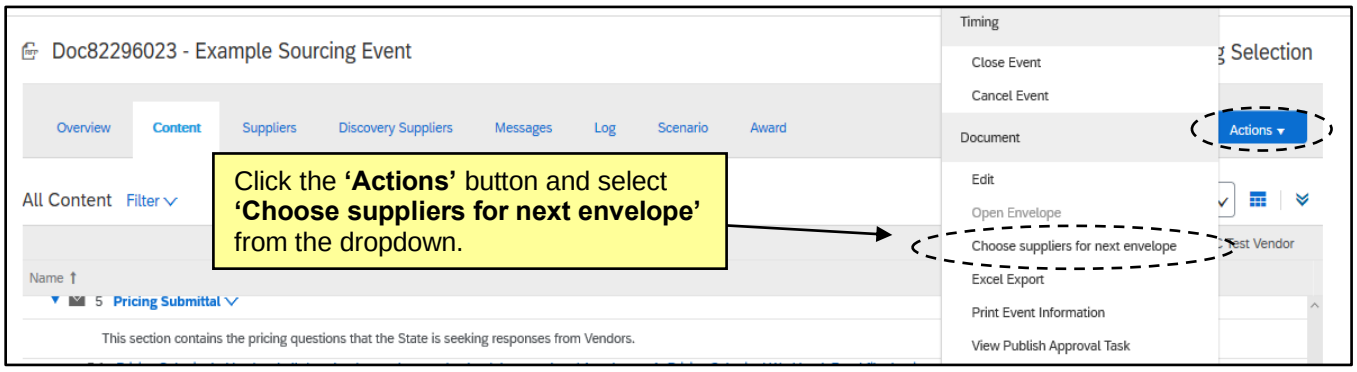
2. The **'Open Envelope Confirmation'** page will display a list of the participating vendors. Click **'Open Envelope'** to compare the responses for the vendor information contained in **'Envelope 1.'** Pricing information is not displayed until **'Envelope 2'** is opened.



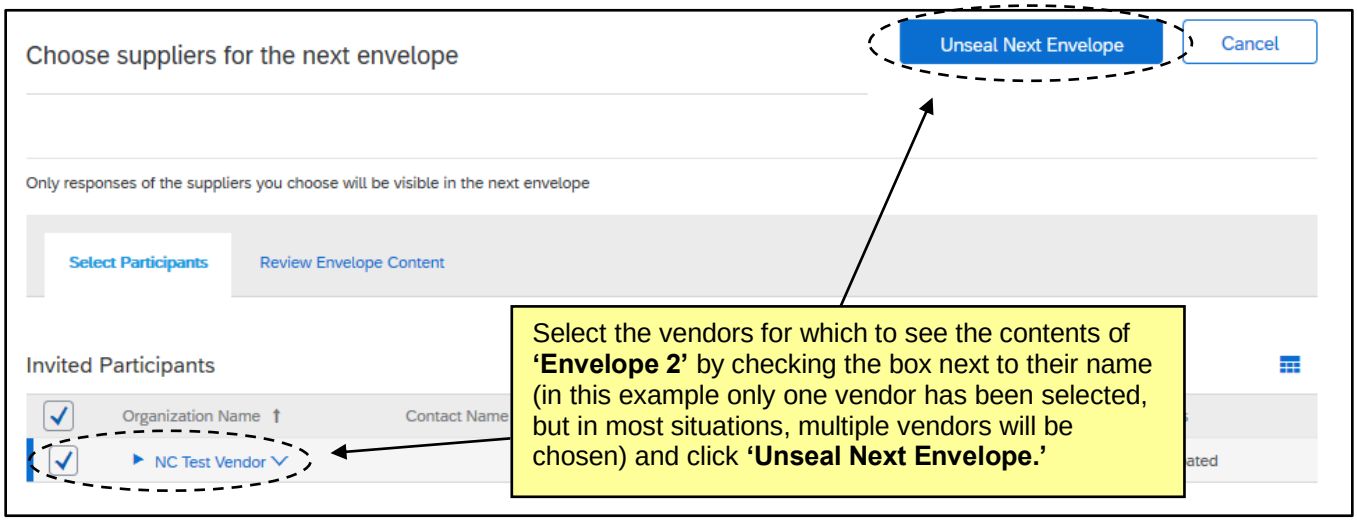
3. Navigate to the **'Content'** tab if not already there and scroll down to see the **'Envelope 1'** responses revealed to the right of Sections 4, 6, and 7. The vendor's name will display at the top of the column, and if there are several responses, the user will have to keep scrolling to the right to see them all.



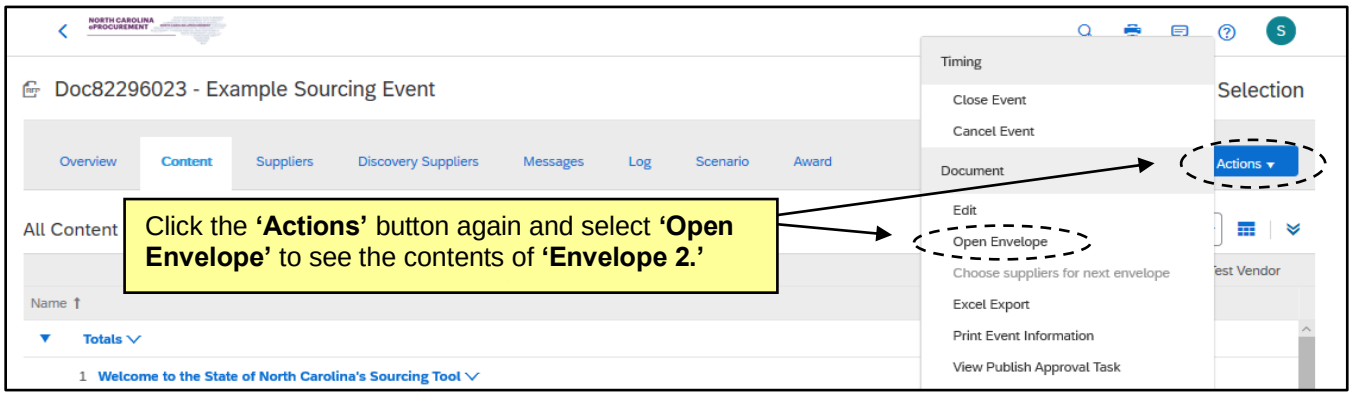
4. When all the **'Envelope 1'** content has been reviewed, click on the **'Actions'** button again and select **'Choose suppliers for next envelope'** from the dropdown menu.



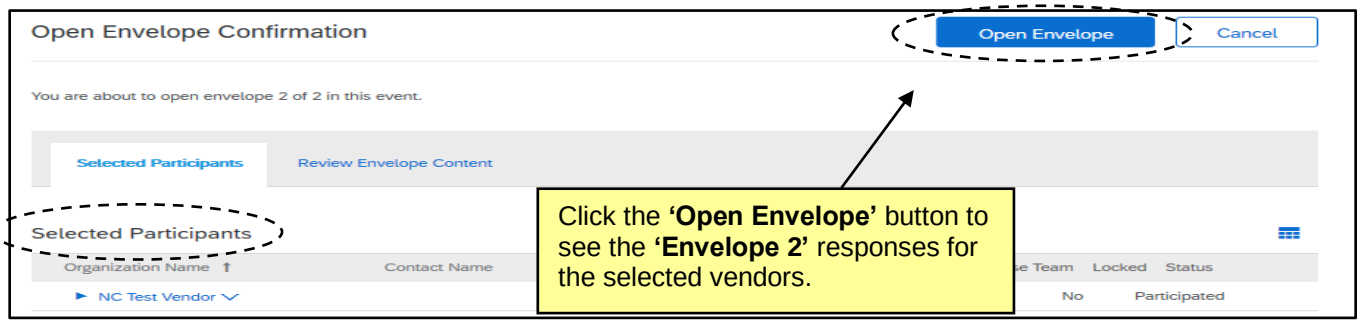
5. The **'Choose suppliers for next envelope'** page will display, and users can select for which vendors they'd like to see pricing information. It can be for all vendors, or they can choose to exclude certain vendors if the information they saw in **'Envelope 1'** excluded them from moving on in the process. Check the boxes next to the vendors of interest and click the **'Unseal Next Envelope'** button.



6. Back on the **'Content'** tab, click the **'Actions'** button and select **'Open Envelope'** from the dropdown menu.

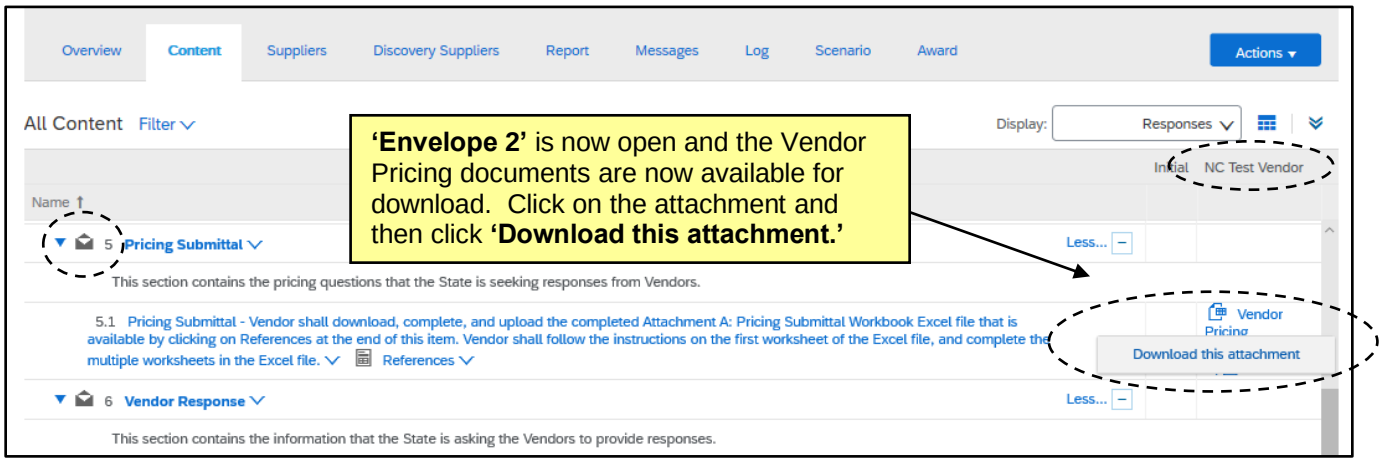


7. The **'Open Envelope Confirmation'** page will display listing all participating vendors. Click **'Open Envelope'** to compare the responses for the pricing information contained in **'Envelope 2.'**



8. On the **'Content'** tab, **'Envelope 2'** in Section 5 is now open. On the right side the user will now see the Pricing Response documents the vendors uploaded. Click on the attachment and select **'Download this attachment'** from the popup to download and review the pricing submittals.

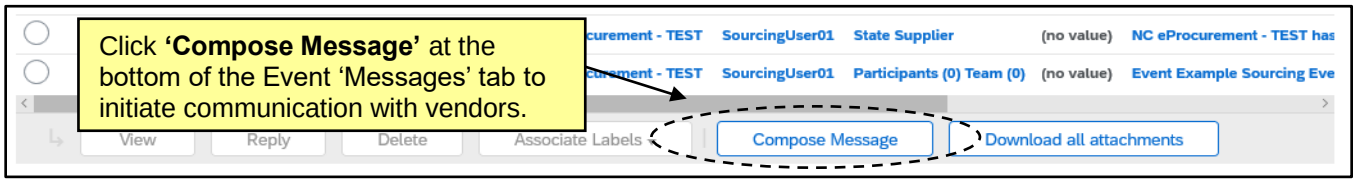
   Note: There is an option in the **'Actions'** dropdown menu to **'Download All Supplier Attachments'** where users can mass-select vendors and sections and download everything all at once.



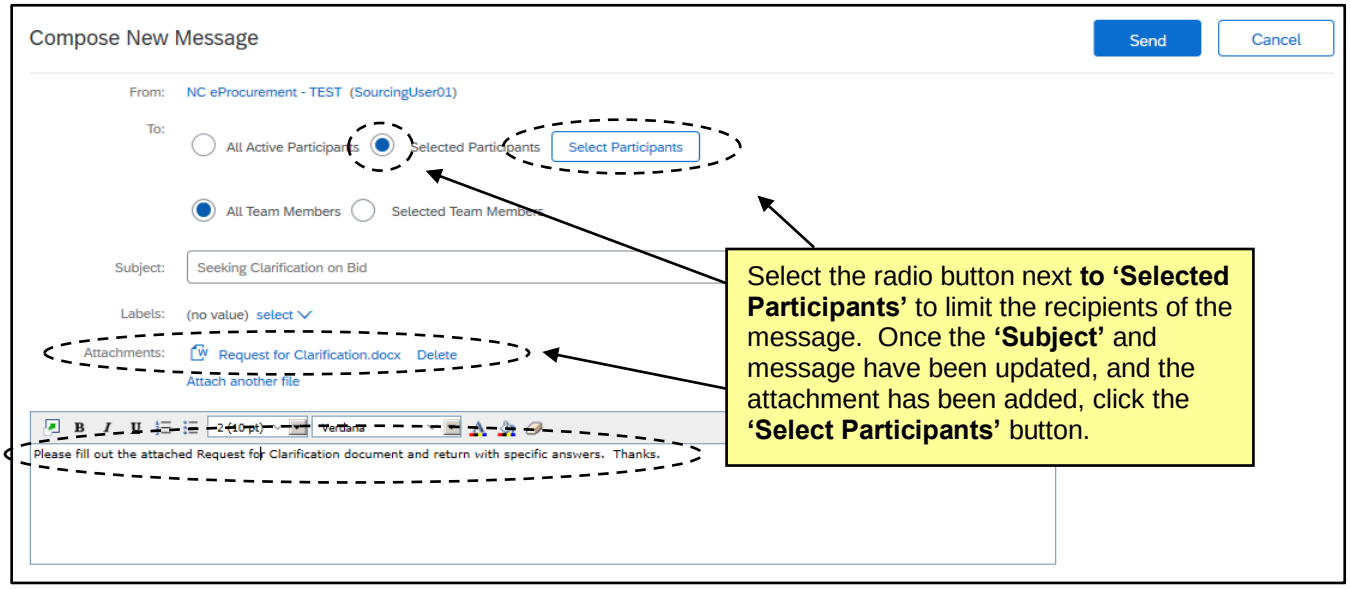
9. Before fully reviewing and evaluating all responses against each other, take the information gathered and create a **'Preliminary Bid Tabulation with Vendor Name and Product ID Only'** and post that on IPS.

   Note: The **'Report'** tab on the Event has a button called **'Download Reports.'** Selecting **'Question and Terms Report'** may help in providing a list of all vendors who responded in Excel format.

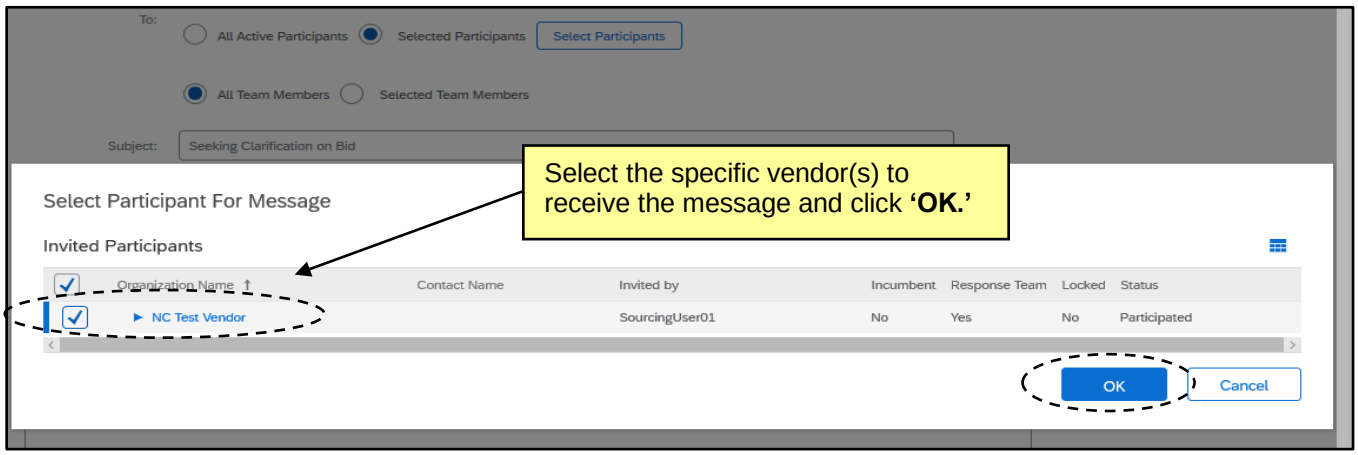
10. While reviewing the vendor responses, it may be necessary to seek clarification with certain vendors or request a BAFO. This communication will be made through the Event message board. Navigate to the **'Messages'** tab and click the **'Compose Message'** button at the bottom of the screen.



11. On the **'Compose New Message'** page, select the recipients of the message. Unlike adding an **'Addendum'** where the audience is everyone, in a situation where the user is seeking clarification or a BAFO, the message will likely be directed to a smaller group of participants, if not just one. Click the radio button next to **'Selected Participants,'** enter a more specific **'Subject,'** and write an informative message in the body. Attach a **'Request for Clarification'** form (the template for which can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab of the Project). Then click **'Select Participants'** to narrow down the recipient group.



12. The **'Select Participant For Message'** popup will display, and the user can select to which vendor(s) the message should be sent; next, the user can click **'OK,'** and then click **'Send'** back on the **'Compose New Message'** page. The new message will display on the **'Messages'** tab, and the user will wait for a response from the selected vendor before making any more decisions.

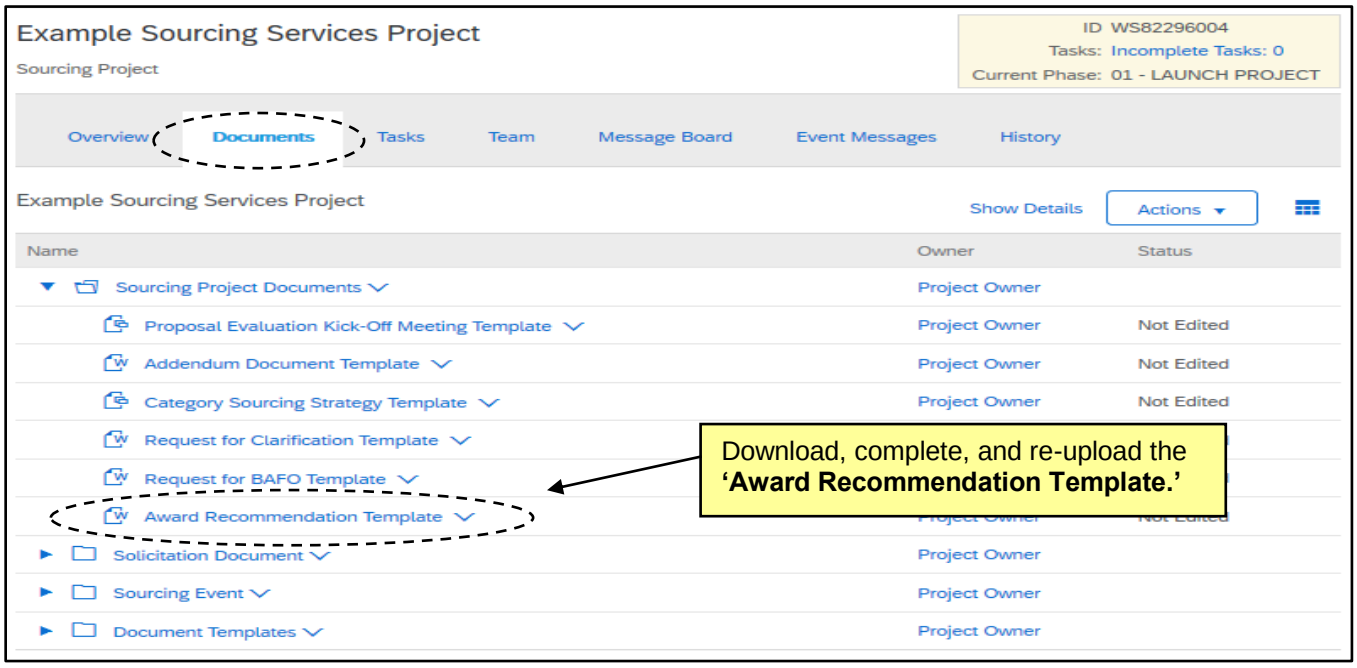


13. If the user needs to request a BAFO from a specific vendor, the request will begin with a targeted message as demonstrated above, but the user should attach a **'Request for BAFO'** form instead of a **'Request for Clarification'** form. In a **'Lite'** Sourcing Project, there is no **'Task'** associated with requesting a BAFO (there is in a **'Full'** Sourcing Project), but a **'Request for BAFO Template'** document is available on the **'Documents'** tab of the Project.

VIII. Awarding the Solicitation

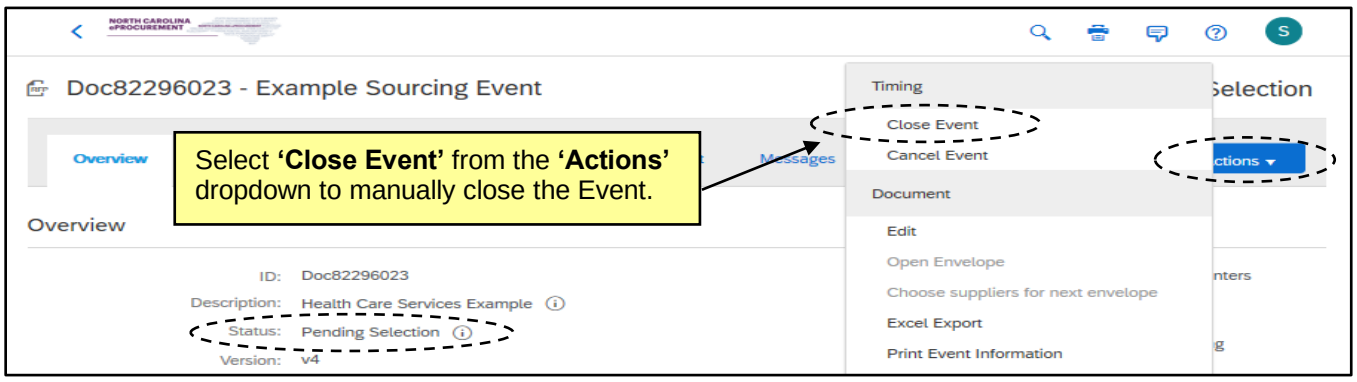
After all information has been received and considered, the user can develop an **'Award Recommendation'** and post the final Bid Tabulation and Award Notification on IPS. The Event has **'Scenario'** and **'Award'** tabs on it, but those are not used at this time. All decisions will be made offline with the information gathered in the Event, though the **'Award Recommendation Template'** can be found on the **'Documents'** tab of the Project.

1. Once all the information has been gathered from the Event and all input has been considered, the user should go to the **'Documents'** tab on the Project and download the **'Award Recommendation Template'** from the **'Sourcing Project Documents'** folder. It should be completed with information about the winning bid and re-uploaded onto the **'Documents'** tab for historical purposes.

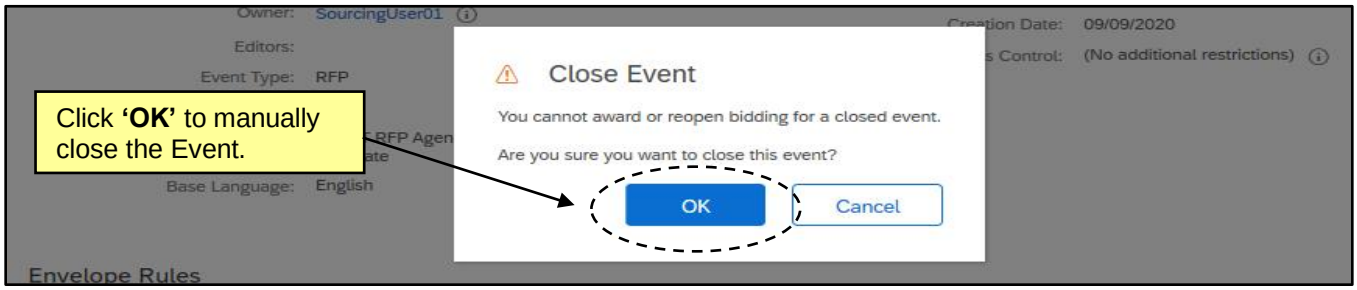


2. Take the completed **'Award Recommendation'** document, along with a final, detailed Bid Tabulation (for which there is not template in the Project) and post both documents in IPS.

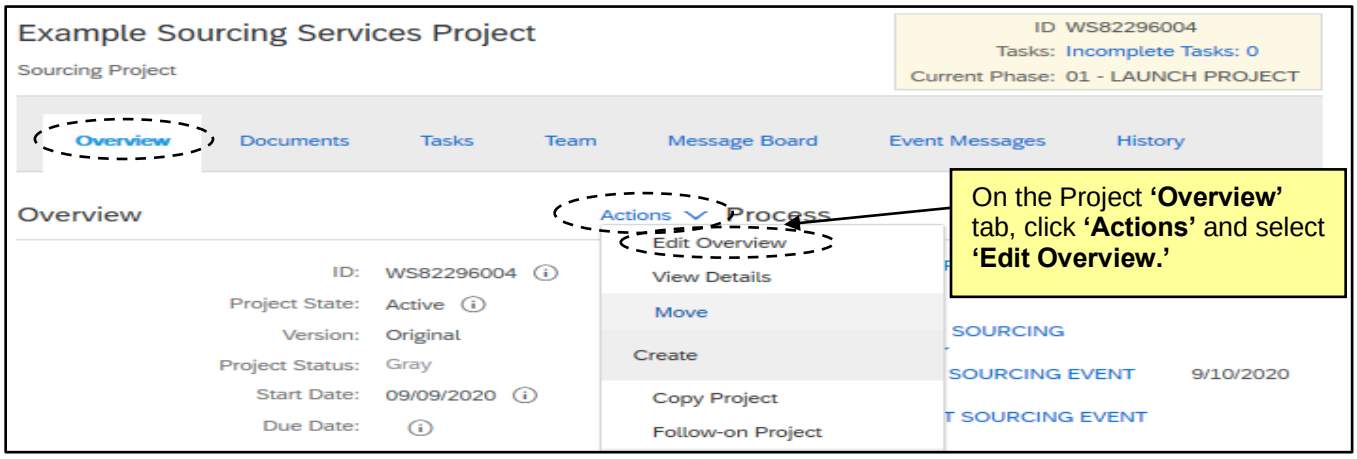
3. Now that solicitation has been awarded, return to the Event to close it. Even though an award has been issued, the status will still read **'Pending Selection'** because the award was determined outside of the Event. To manually close the Event, click the **'Actions'** button in the top right and select **'Close Event.'**



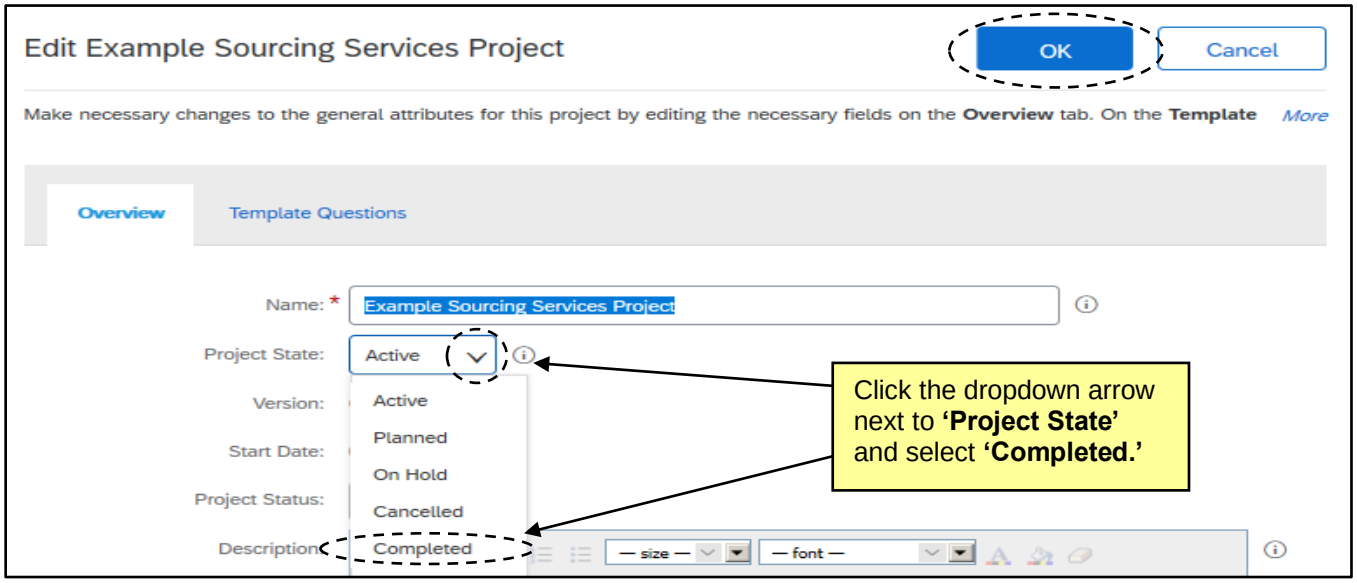
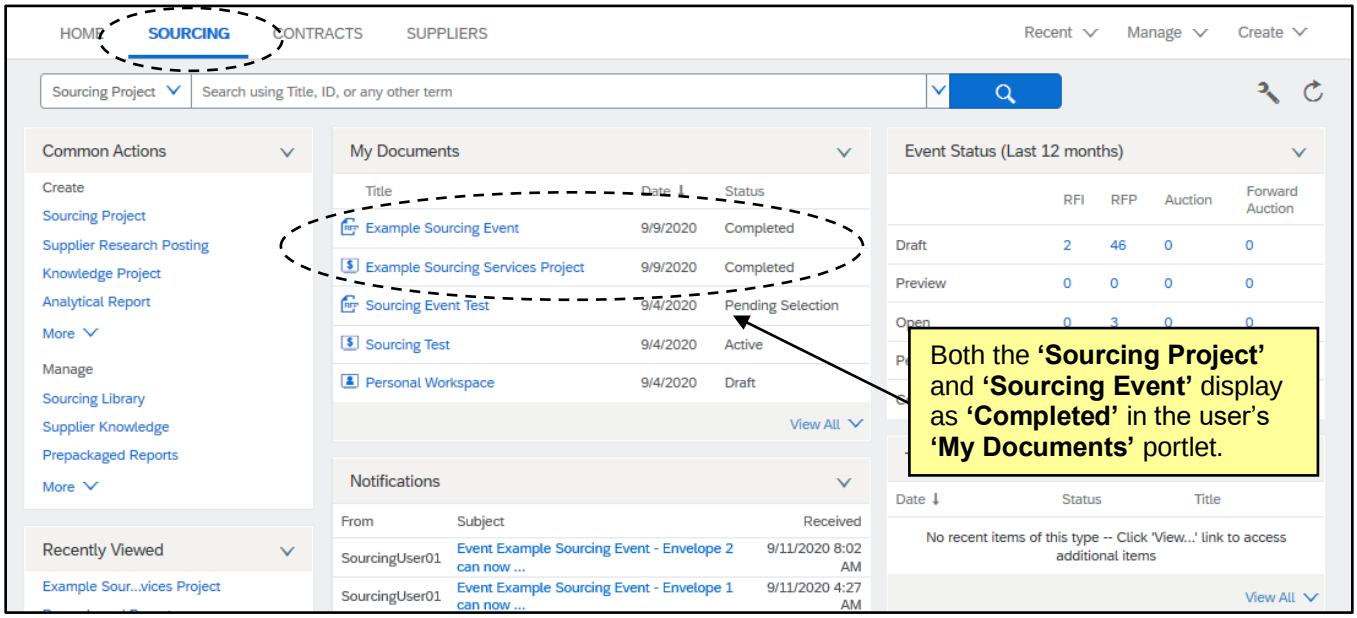
4. The **'Close Event'** warning will display reminding the user that **'Closed'** Events cannot be reopened, which is okay because they can still be accessed for important historical information. Click **'OK.'**



5. The Event status will update to **'Completed.'** Now navigate back to the **'Overview'** tab of the Project to mark that as **'Completed,'** too. Click **'Actions'** at the top of the **'Overview'** tab and select **'Edit Overview'** from the dropdown menu.



6. On the next page, click the dropdown next to **'Project State'** and select **'Completed,'** then click **'OK.'**



7. The Status of both Project and Event will now reflect **'Completed'** and will display as such in the **'My Documents'** portal on the **'Sourcing'** tab. The next step will be to create a **'Contract Workspace'** from the completed Sourcing Project.